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ABSTRACT

This skills packet is part of the North Carolina Helping Education in Low-Performing Schools program. This initiative helps educators establish ties with technical-assistance partners who can facilitate school-improvement efforts. The skills packet, which was designed to be delivered by a skilled trainer, focuses on leadership development. Its four sections: (1) Instructional Leader; (2) Planning; (3) Site-Based Management and Other Education Reform Programs, and (4) Communication, which contains activities that are intended to help participants identify instructional leadership styles, describe the characteristics of an effective leader, design and communicate a vision and mission, utilize appropriate planning tools and practices, provide direction in planning for student achievement, implement and institutionalize an effective site-based management program, and communicate with a variety of audiences. Each activity is formatted the same way. Following the activity number and name, a chart details the time needed to carry out the activity, the purpose of the activity, the setting for the activity, the materials and equipment that are needed, and a synopsis of the intended results. The activities are geared primarily for small groups and require a high degree of participation. It is hoped that participants will learn the intricacies of partnerships and how alliances can best be used for school improvement. (RJM)

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Leadership Development

EA 030302

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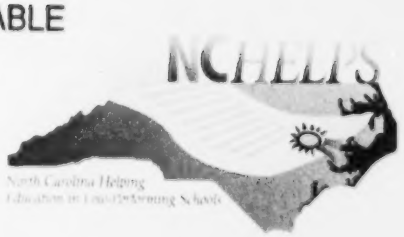

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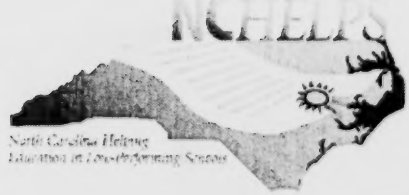

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Implementation Suggestions

Implementation Suggestions

What skill level does a trainer need to deliver this skill packet?

Trainers delivering this skill packet, *Leadership Development*, need moderate to high trainer skills. Some of the activities require the ability to read a group and adapt activities based on the group's reactions to an activity. Other activities require trainers to be comfortable with processing (i.e., synthesizing, analyzing) the outcomes with participants.

How can a trainer prepare to deliver this skill packet?

To prepare to deliver this skill packet, a trainer should read and become thoroughly familiar with any materials participants are expected to read as part of activities and the documents listed in the bibliography at the end of the skill packet.

Additionally, the trainer should review any activities being used in the skill packet to make sure that s/he is thoroughly familiar with the "flow" of the parts of the activity and comfortable with leading participants through the activity.

Next, a trainer should prepare handouts and transparencies to be used in the skill packet.

Finally, a trainer should prepare the training room, taking care to provide participants with as many creature comforts as possible.

What tips are there for working with adults?

The following statements about adults as learners are taken from the article by Fred H. Wood and Steven R. Thompson, "Assumptions about Staff Development Based on Research and Best Practice."

Adult Learner Characteristics	Staff Development Implications
Adults will commit to learning when the goals and objectives are considered realistic and important to them.	Staff Development should address areas that educators believe are important and have immediate application in the "real world."
Adults will learn, retain, and use what they perceive is relevant to their personal and professional needs.	Staff development must enable teachers and administrators to see the relationship between what they are learning and their day-to-day activities and problems.
Adult learning is ego involved; asking an educator to learn and implement new professional behaviors may promote a more or less positive view of self.	Staff development should be structured to provide support from peers and reduce the fear of judgment during learning.
Adults need to see the results of their efforts and have feedback on how well they are doing.	Staff development should provide opportunities for educators to try out what they are learning and receive structured, helpful feedback.

Adult Learner Characteristics	Staff Development Implications
Adults are much more concrete in the way they operate than formerly thought.	Educators should have an opportunity for directed, concrete experiences in which they apply what they are learning in a real or simulated work setting.
Adults who participate in small groups are more likely to move their learning beyond understanding to application, analysis, synthesis, and evaluation.	Staff development ought to include learning in small groups in which teachers and administrators have an opportunity to share, reflect, and generalize from their learning and experiences.
Adults come to learning with a wide range of previous experiences, knowledge, self-direction, interests, and competencies.	Staff development must accommodate this diversity in terms of needs, knowledge, readiness to learn, etc.
Adults want to be the origin of their own learning and will resist learning situations that they believe are an attack on their competence.	Staff development needs to give educators some control over the what, who, how, why, when, and where of their learning.
Because the transfer of learning is not automatic for adults, it must be planned for and facilitated.	Coaching and other kinds of follow-up support are needed to help educators transfer learning into daily practice.

What are some training tips?

- Select the most comfortable site for training with comfortable chairs, tables, good lighting, adjustable heat or air conditioning, adjacent rest rooms, etc.
- Use the best audio-visual equipment that is available.
- Have music available to use before the session, during breaks, at lunch, etc.
- Have a roll sheet for participants to sign in each day.
- Have participants make name tags.
- Have individually wrapped pieces of candy on each table for snacking.
- Place materials in folders.
- Have as many activities as possible posted on walls prior to the start of the session in which they will be used.
- Have a bell or "popper" to use as a signal during activities.
- Have supplementary materials on display for review by participants.
- Have extra materials and business cards available for participants to take as they wish.
- Start each new session with a warm up activity.
- Start on time; finish on time; take breaks as indicated.
- Keep pace appropriate to activities. Do not pressure, but do not lag.
- Keep atmosphere friendly, helpful, open, and humorous.
- Re-group table groups occasionally so that participants meet new people.

- Do energizers from time to time as energy lags—just before lunch, after lunch, in the afternoon after a day-long session. For example, dance the "hokey-pokey"; do sit-down exercises; do deep breathing exercises.
- Observe constantly to gauge the level of participants' involvement. Try to involve everyone in discussion by having various tasks for table group participants to perform (e.g., reporter, recorder, time keeper facilitator).

How should this skill packet be delivered?

For an in-depth coverage of the information in this skill packet, trainers should deliver the activities in brief sessions spread out over a span of time (e.g., several weeks or months).

Also, warm-up activities, supplemental activities, and homework assignments can be added to enrich the basic content of the packet.

Participants may determine that some of the topics covered in the skill packet deserve further study. In their study, they may want to use some of the following types of activities:

- journal clubs,
- study groups,
- structured classroom observations with debriefing sessions,
- structured visitations with debriefing sessions,
- workshops with application in the classroom, and
- development of pacing guides, instructional materials, or curriculum guides.

In summary, for the best effect, the activities in this skill packet should be spread over time with provision for reflection, application, and synthesis built into the delivery schedule.

How should the training room be set up?

The training room should be set up so that all participants are as comfortable as possible and can see and hear everything that they need to participate in the activities. The trainer needs a table for activity sheets, transparencies, materials, and equipment; a refreshment table; a materials display table; and a small table set up near the entrance for agendas, name tags, and roll sheets.

Organization of Materials

Organization of Materials

How are the materials in the skill packet organized?

The activities in the entire skill packet are described in a Packet Overview. Then the activities in this skill packet are arranged sequentially and described on individual activity direction sheets.

How is the Packet Overview to be used?

The Packet Overview gives a trainer a **quick overview** of the entire skill packet. The Packet Overview is laid out in a matrix similar to the one at the top of each activity direction sheet. In this way, a trainer has a ready-reference to the entire skill package:

- the number of each activity,
- the time needed to carry out all of the activities in each section,
- the purposes of each section, and
- the content of each section.

How are the activity direction sheets formatted?

Each activity direction sheet is formatted the same way. Centered at the top of the page, the activity number and name are listed. Following the activity number and name is a matrix giving

- the time necessary to carry out the activity,
- the purpose(s) of the activity,
- the setting for the activity (e.g., individual, small group, triads), and
- the materials and equipment needed for the activity.

The remainder of each activity direction sheet is divided into two columns. On the **left side of the page** in bold letters are listed the actions which the trainer should do to carry out the activity. Also listed on the left side are the equipment and materials as they are needed **sequentially** in the activity. On the **right side of the page**, the trainer is given a more complete explanation as to how the activity is to be carried out.

Packet Overview

Packet Overview: Leadership Development

SECTION		TIME	PURPOSE	CONTENT
I	Instructional Leadership	5.50 hours	To examine instructional leadership (characteristics, styles, roles/responsibilities, and vision) and conduct self-evaluations and develop an action plans To develop vision/mission statements	Characteristics of instructional leaders and leadership styles Roles and responsibilities of instructional leaders Develop a mission/vision and gain faculty buy-in
II	Planning	7.75 hours	To provide appropriate planning tools and practices that will support effective instruction To discuss planning for student achievement	Examine practices in time-management, scheduling and data analysis Planning for student achievement: high expectations, motivation, curriculum, instruction, and assessment
III	Site-based Management	7.50 hours	To examine the rationale, types, implementation strategies, and barriers for Site-based Management	Definition of Site-based Management Implementing Site-based Management Other school reform models
IV	Communication	2 hours	To provide effective communication strategies To identify the stakeholders necessary to communicate with in order to build educational partnerships	Effective communication strategies with parents, teachers, and media Ways in which volunteers can help at the school level

Outcomes

OUTCOMES

At the end of this skill packet participants will be able

- To identify instructional leadership styles
- To describe the characteristics of an effective leader
- To design and communicate a vision and mission for his/her school
- To utilize appropriate planning tools and practices
- To provide direction in planning for student achievement
- To implement and institutionalize an effective site-based management program
- To effectively communicate with a variety of audiences.

Section I: Instructional Leadership

SECTION I: ACTIVITY 1

TIME	PURPOSE	SETTING	MATERIALS
1.5 hours	• To provide an overview of the leadership workshop and individual session • To discuss characteristics of an instructional leader vs. a manager • To provide research articles/resources on strong instructional leadership and give participants an opportunity to discuss them • To introduce the homework assignment of the self-assessment and action plan and explain how these will be used	Whole Group Small Group	Overhead projector Transparencies— Quotes 1 and 2 Transparency— Overview Transp.—Definition of Manage and Lead Transparency markers Handout—Venn Diagram Chart Paper Markers Masking Tape Transp.—Manager vs. Leader Handout—Manager vs. Leader Five articles listed below Handout—"Standards for Principal and Assistant Principal Evaluation" Handout—Individual Action Plan

Introduce workshop and session

Transparencies–Quotes 1 and 2
Transparency–Overview

Open the session using transparencies of quotes concerning leadership (Transparencies–*Quotes 1 and 2*).

Give an overview of the workshop/session using the Transparency–*Overview*.

Note: Group warm-up activities may be added at the beginning of the session to introduce participants and trainers.

Discuss managers vs. instructional leaders

Transparency–Definition of Manage and Lead

As a whole group, discuss the definition of "manage" vs. "lead." Give participants an opportunity to provide a definition for each. Write one or two definitions of each on transparency or chart paper. Note: If possible, any work that the group produces on transparencies or chart paper should be typed after the session and shared with the group as handouts before or at the next session.

Discuss managers vs. instructional leaders, contd.

Transparency marker
Handout–Venn diagram
Chart paper
Markers
Masking tape
Transp.–Manager vs. Leader
Handout–Manager vs. Leader

Using a Venn diagram, which you draw on chart paper, ask the whole group to compare and contrast characteristics of managers and instructional leaders. Provide an opportunity to discuss these characteristics. Display work on the wall after it is completed.

Note: A handout of a Venn diagram is provided for individual note-taking or if the trainer chooses to turn this into a small-group activity before whole-group sharing.

For further discussion, show Transparency —*Manager vs. Leader*—and provide participants with the Handout—*Manager vs. Leader*.

Discuss articles/ resources on strong instructional leaders

Five articles
Chart paper
Markers
Masking tape

Ask participants to divide into groups of three or four people. Assign an article on strong instructional leadership to each group. Five articles are suggested below, or others may be located. Ask groups to read the articles and then report back. Discuss main points with the whole group and record ideas on chart paper.

Suggested time: 30 minutes to read the articles, discuss, and prepare presentations; group presentations of 2-3 minutes each.

Articles:

- *Instructional Leadership: An Informal Approach*, Joseph F. Rogus.
- *Instructional Leadership: Focus on Curriculum Responsibilities*, Joseph Murphy.
- *Leadership: A Focus on Leadership for Student Achievement*, Ronald D. Williamson.
- *Shared Decision Making Requires Effective Instructional Leadership*, Mae Bernd.
- *The Effective Principal and Curriculum–A Focus on Leadership*, Barry Kanpol and Eva Weisz.

(See Bibliography for complete information necessary to locate articles.)

Assign homework

Homework assignment: Participants should (1) complete pre-assessment using the Handout—*Standards for Principal and Assistant Principal Evaluation*, (2) use Handout—*Individual Action Plan* record (in the far left column) areas of needed improvement, and (3) bring the completed "Standards for Principal and Assistant Principal Evaluation" instrument and their Individual Action Plan with them to the next session.

Other resources

Armstrong, John D. (October 1988). A change of leaders–a case study in instructional leadership. *NASSP Bulletin*, 11-16.

Donmoyer, Robert, and Wagstaff, Juanita Garcia (April 1990). Principals can be effective managers and instructional leaders. *NASSP Bulletin*, 20-29.

Frase, Larry E., and Melton, R. Gerald (January 1992). Manager or participatory leader? What does it take? *NASSP Bulletin*, 17-24.

Gardner, John W. (October 1988). The tasks of leadership. *NASSP Bulletin*, 77.

George, Paul S., and Grebing, Walt (Summer 1992). Seven essential skills of middle level leadership. *Schools in the Middle*, 1(4), 3-11.

Terry, Paul (Winter 1996). Effective leadership. *Catalyst for Change*, 25(2), 10-14.

Every Child Can Succeed Video Series–
Part III. Program 2. Instructional Leadership, @ 20 minutes
Part III. Program 3. School Leadership, @ 20 minutes

The Video Journal of Education Series–
Principals: Leaders of Change. Featuring Terrence E. Deal and Kent D. Peterson.

- Program One–Innovative Leadership for School Improvement, 31 minutes
- Program Two–Culture-Building Leadership, 37 minutes

Section I: Activity 1
Transparency—Quote 1

"The new leader is a facilitator, not an order giver."

John Naisbitt

Section I: Activity 1
Transparency—Quote 2

"Without leadership, an organization is like a lifeboat adrift in turbulent seas with no oars, no compass, no maps–and no hope."

Burt Nanus, Visionary Leadership

Section I: Activity 1
Transparency—Overview

Leadership Development Overview

I. Instructional Leadership

II. Planning

III. Site-Based Management

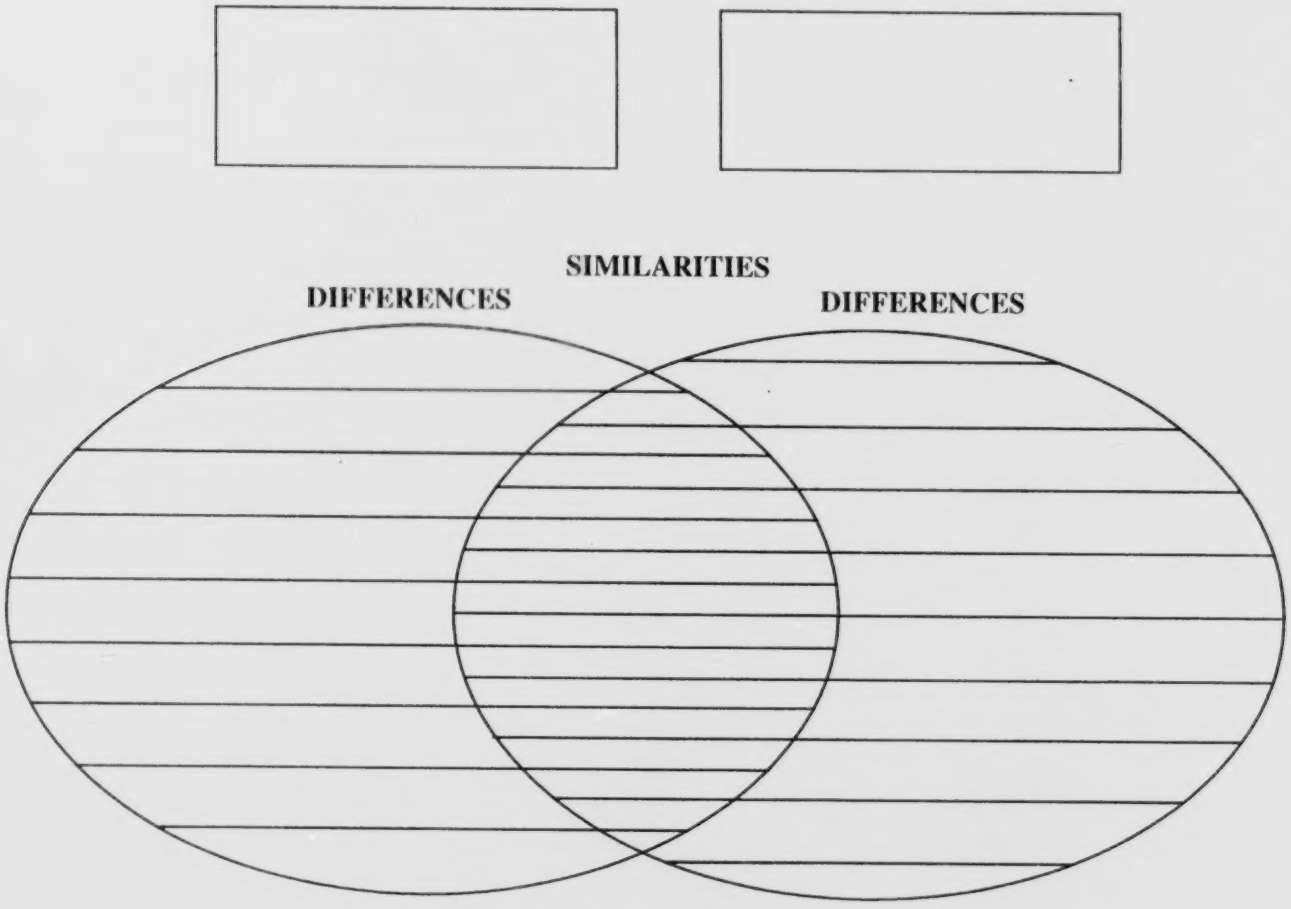
IV. Communication

Section I: Activity 1
Transparency—Definition of Manage and Lead

Definition of "MANAGE"

Definition of "LEAD"

Section I: Activity 1
Handout–Venn Diagram



Section I: Activity 1
Transparency—Manager vs. Leader

Manager

- Administers
- A copy/imitates
- Systems and structure
- Control
- Short-range view
- How and when?
- Eye on bottom line
- Accepts status quo
- Classic good soldier
- Does things right

Leader

- Innovates
- Original/originates
- People
- Trust
- Long-range perspective
- What and why?
- Eye on the horizon
- Challenges status quo
- His/Her own person
- Does the right thing

(Bennis, 1989)

Section I: Activity 1
Handout—Manager vs. Leader

- The manager administers; the leader innovates.
- The manager is a copy; the leader is an original.
- The manager focuses on systems and structure; the leader focuses on people.
- The manager relies on control; the leader inspires trust.
- The manager has a short-range view; the leader has a long-range perspective.
- The manager asks how and when; the leader asks what and why.
- The manager has his eye always on the bottom line; the leader has his eye on the horizon.
- The manager imitates; the leader originates.
- The manager accepts the status quo; the leader challenges it.
- The manager is the classic good soldier; the leader is his own person.
- The manager does things right; the leader does the right thing.

(Bennis, 1989, p. 45)

Section I: Activity 1
Handout—Standards for Principal and Assistant Principal Evaluation

Directions: Use the ten-point scale at the left column (1 as the lowest and 10 as the highest) to mark where you believe you are performing on each one of the standards. Later, a different color or mark can be used to re-assess where you believe you are after having time and opportunities for growth/implementation of your individual action plan.

Pre-/Post-Assessment	Standards
I. Area One – Vision The principal is an educational leader who facilitates the development, implementation, and communication of a shared vision of learning that reflects excellence and equity for all students.	
Low High **1 2 3 4 5 6 7 8 9 10**	1.1 Involves stakeholders in the development of a broad vision of what the school should be and a plan for how to get there.
1 2 3 4 5 6 7 8 9 10	1.2 Works with stakeholders to establish goals and to set priorities for implementing the school's vision via the School Improvement Plan.
1 2 3 4 5 6 7 8 9 10	1.3 Communicates the school's vision, goals, and priorities to appropriate constituencies.
1 2 3 4 5 6 7 8 9 10	1.4 Uses organizational skills, including problem solving and decision-making, to implement and refine the school's vision.
1 2 3 4 5 6 7 8 9 10	1.5 Evaluates progress toward achieving the school's vision.
II. Area Two - High Student Performance The principal is an educational leader who promotes the development of organizational, instructional, and assessment strategies to enhance teaching and learning.	
Low High **1 2 3 4 5 6 7 8 9 10**	2.1 Ensures that the school meets the growth standards established by the North Carolina ABCs of Public Education accountability model.
1 2 3 4 5 6 7 8 9 10	2.2 Ensures that the instructional staff adheres to the North Carolina Standard Course of Study.
1 2 3 4 5 6 7 8 9 10	2.3 Guides development and implementation of programs and practices that ensure mastery of essential knowledge and skills by every student.
1 2 3 4 5 6 7 8 9 10	2.4 Recognizes, honors, and celebrates success.
1 2 3 4 5 6 7 8 9 10	2.5 Monitors and evaluates the effectiveness of school programs and makes modifications where necessary to prepare all students for lifelong learning and career readiness.
1 2 3 4 5 6 7 8 9 10	2.6 Monitors student progress and determines whether students have achieved high standards.
1 2 3 4 5 6 7 8 9 10	2.7 Develops a master schedule to maximize learning for all students.
1 2 3 4 5 6 7 8 9 10	2.8 Ensures that teachers use assessment results to facilitate educational excellence and support high student achievement.
III. Area Three - Safe and Orderly Schools The principal is an educational leader who works with others to ensure a working and learning climate that is safe, secure, and respectful of diversity.	

Low High 1 2 3 4 5 6 7 8 9 10	3.1 Helps develop the shared understandings and values which lead to a climate of openness, fairness, mutual respect, support, and inquiry.
1 2 3 4 5 6 7 8 9 10	3.2 Monitors and maintains a safe, secure, and caring school environment.
1 2 3 4 5 6 7 8 9 10	3.3 Deals with student misconduct in a prompt and effective manner and maintains a school free of controlled and illegal substances and all harmful behavior.
1 2 3 4 5 6 7 8 9 10	3.4 Manages and resolves conflict and crises effectively.
1 2 3 4 5 6 7 8 9 10	3.5 Manages the diverse social and intellectual needs of all constituents to demonstrate respect for diversity.
1 2 3 4 5 6 7 8 9 10	3.6 Models and supports self-discipline and responsibility.
IV. Area Four - Quality Teachers, Administrators, and Staff The principal is an educational leader who fosters a culture of continuous improvement focused upon teaching and learning.	
Low High 1 2 3 4 5 6 7 8 9 10	4.1 Aligns the school's professional development plan with its school improvement plan and state priorities.
1 2 3 4 5 6 7 8 9 10	4.2 Supports the recruitment, induction, development and retention of a diverse corps of quality teachers and staff.
1 2 3 4 5 6 7 8 9 10	4.3 Provides for the professional development necessary to support collaboration, empowerment, and high performance of all teachers and staff.
1 2 3 4 5 6 7 8 9 10	4.4 Develops teaching and learning practices based on current theory and research.
Low High 1 2 3 4 5 6 7 8 9 10	4.5 Pursues intellectual development for self and facilitates formal and informal learning opportunities for staff and community.
1 2 3 4 5 6 7 8 9 10	4.6 Supports a wellness program for the development of self and others.
1 2 3 4 5 6 7 8 9 10	4.7 Maintains a school climate that supports risk taking, innovation, and high expectations.
1 2 3 4 5 6 7 8 9 10	4.8 Supervises and evaluates personnel assigned to the school.
1 2 3 4 5 6 7 8 9 10	4.9 Demonstrates integrity and promotes high ethical and professional standards for all.
V. Area Five - Effective and Efficient Operation The principal is an educational leader who uses excellent management and leadership skills to achieve effective and efficient organizational operations.	
Low High 1 2 3 4 5 6 7 8 9 10	5.1 Monitors the alignment of curriculum and instruction and other components of the educational system to achieve high performance for all students.
1 2 3 4 5 6 7 8 9 10	5.2 Listens actively and effectively responds to issues, achieves consensus, and facilitates closure.
1 2 3 4 5 6 7 8 9 10	5.3 Works with stakeholders to set school improvement goals and plans for achieving them, and ensures that decisions are made at the most appropriate level closest to the classroom.
1 2 3 4 5 6 7 8 9 10	5.4 Develops effective interpersonal relationships in an open, honest, and credible manner.
1 2 3 4 5 6 7 8 9 10	5.5 Uses available technology to enhance communication.
1 2 3 4 5 6 7 8 9 10	5.6 Articulates ideas and beliefs clearly in speaking and writing, interacting effectively with the news media and the public.
1 2 3 4 5 6 7 8 9 10	5.7 Acquires the resources necessary to achieve school improvement goals.

1 2 3 4 5 6 7 8 9 10	5.8 Seeks and maintains internal and external partnerships aligned to state and local goals.
1 2 3 4 5 6 7 8 9 10	5.9 Maintains informational and accountability systems to report strategic and operational results accurately and efficiently.
1 2 3 4 5 6 7 8 9 10	5.10 Distributes financial and personnel resources to maximize education achievement of all students.
Low High 1 2 3 4 5 6 7 8 9 10	5.11 Ensures that school programs and procedures comply with local, state, and federal regulations.

Note: The "Standards for Principal and Assistant Principal Evaluation" was approved at the May, 1998, State Board of Education meeting. The pre/post-assessment portion has been added for purposes of this workshop.

Source of the "Standards...": NCDPI, Division of Human Resource Management, Revised 4/15/98, Effective 7/1/98.

Section I: Activity 1
Handout—Individual Action Plan for _____

(person's name)

Date _____

Areas for Improvement	Specific Actions/Strategies	Time Line	Evaluation Measure

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION I: ACTIVITY 2

TIME	PURPOSE	SETTING	MATERIALS
1 hour 15 minutes	• To review/discuss homework assignment on self-assessment and action plan • To come to consensus on the major responsibilities of the instructional leader • To discuss major responsibilities of the instructional leader: legal, essential, desirable components of each responsibility	Whole Group Individual Pairs Small Group	Handout—Standards for Principal and Assistant Principal Evaluation (from Section I: Activity 1) Handout—Individual Action Plan (from Section I: Activity 1) Handouts—Graphic Organizers 1 and 2 Chart paper Markers Masking Tape Notes—Major Responsibilities for Instruction Handout—Responsibilities of the Instructional Leader Public School Laws of North Carolina (one copy per group or participants could furnish their own) Handout–Reflection Sheet Handout–Evaluation Form

Share thoughts on self-assessment and action plan

Handout–"Standards for Principal and Assistant Principal Evaluation" (from Section I: Activity 1)
Handout–Individual Action Plan (from Section I: Activity 1)

Provide opportunity for sharing: (1) reaction to the instrument itself since these standards will be used to evaluate principals and assistant principals in North Carolina and (2) any individual concerns/commonalities among the group on areas for improvement that are being added to the action plan.

Any areas/concerns that are shared should be noted by the trainer and used to guide topics in subsequent sessions. If the group feels uncomfortable discussing openly, use an evaluation form at the end of the session which allows for comments and follow-up topics. Explain the reason for asking for this information.

Reach consensus on major responsibilities of the instructional leader

Handouts–Graphic organizers 1 and 2
Chart paper
Markers
Masking tape
Notes–Major Responsibilities for Instruction

Ask the whole group to come to consensus on the major responsibilities of the instructional leader (the principal/assistant principal as leader of instruction).

One method for reaching consensus is first to have individuals list the major responsibilities on paper; then have pairs and/or small groups of 3-4 to reach consensus; and finally have small groups present their major responsibilities and combine these into a single list as a whole group. Graphic organizers can be used as handouts for recording individual and/or small-group lists; chart paper should be used for whole group work. The graphic organizers that have been included are two types of spider maps. In the circle at the center of either of the two "spiders," participants can record the title "Major Responsibilities of the Instructional Leader." Then each leg of the "spider" can be used to record a major responsibility; individual responsibilities contributing to each major responsibility can be recorded either on the horizontal lines branching from the four-legged "spider" or within the legs of the ten-legged "spider."

Another method is to let one person at the time come to the chart paper and record a major responsibility until all have been mentioned. Combine similar items as a whole group. Ask each participant to rate his/her top choices and summarize to find the group's top choices.

This activity should be facilitated by the trainer; the work and decisions of what to include should be completed by the participants. Refer to the Notes–*Major Responsibilities for Instruction.*

Assign small-group work

Handout—Responsibilities of the Instructional Leader
Public School Laws of North Carolina (enough copies for each group to have one–participants could furnish their own copies)
Chart paper
Markers
Masking tape

Assign one of the major responsibilities to each small group of 3-4 people. Consider allowing them to sign up for their preferences, as long as the groups are of similar sizes. For each major responsibility, the group should discuss (1) any **specific legal responsibilities** the principal/instructional leader has, (2) any **essential duties**, and (3) any **desirables/others** (using the handout Responsibilities of the Instructional Leader). Specific strategies/helpful hints for accomplishing any of these should be discussed also. Small groups should report/present to the whole group and allow time for questions and discussion.

This topic is one which can be completed in a cursory fashion within the class time (using minimal materials). However, the participants may work inside/outside of the workshop for longer periods of time researching, reading, etc.

Summary

Summarize points covered and accomplishments through the group work, and answer any questions participants may have.

Evaluation

Handout–Reflection Sheet
Handout–Individual Action Plan (from Section I: Activity 1)
Handout–Evaluation Form

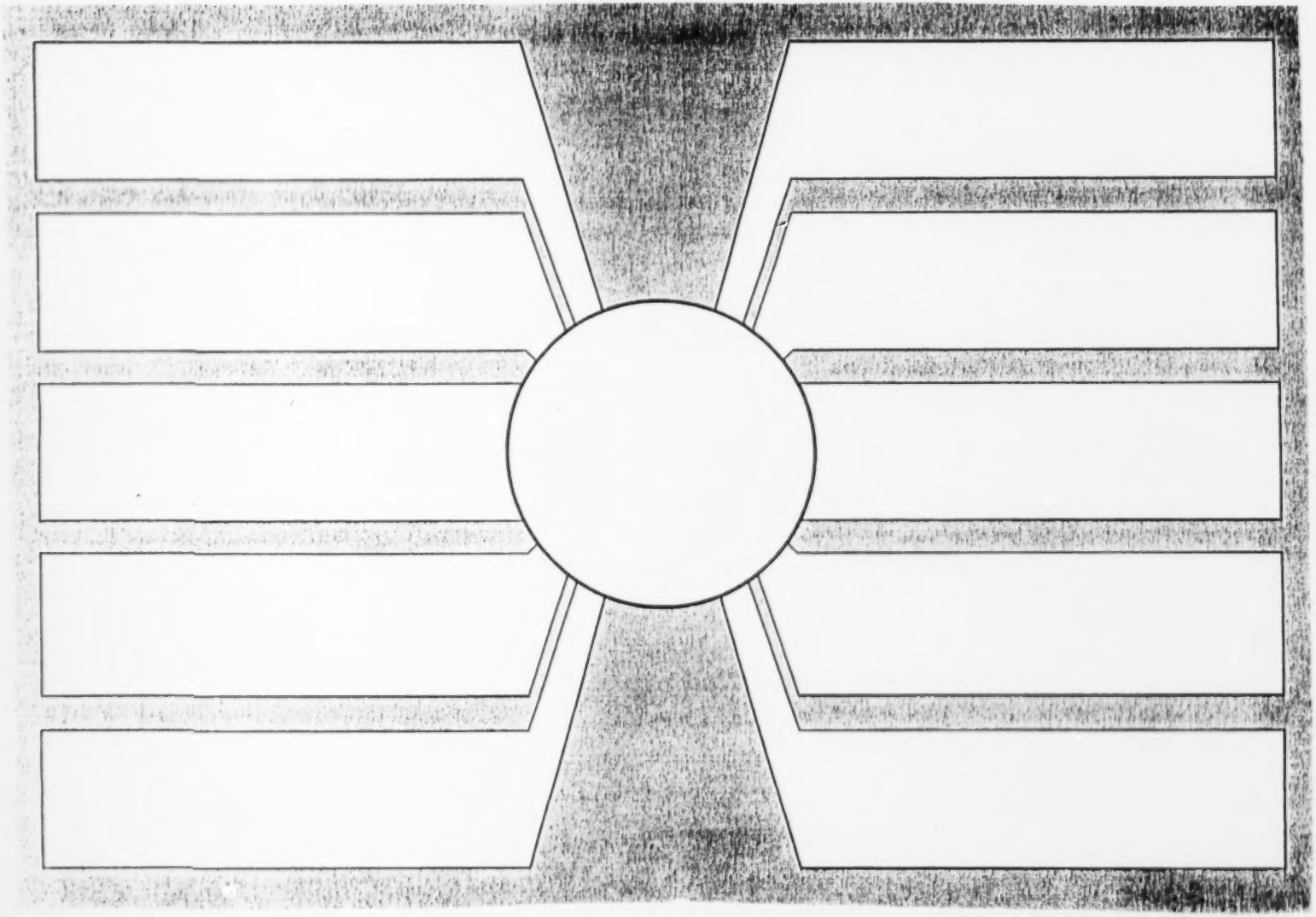
Ask participants to use their reflection sheets to record thoughts, to revise their action plans as needed, and to provide feedback through the evaluation forms.

Other resources

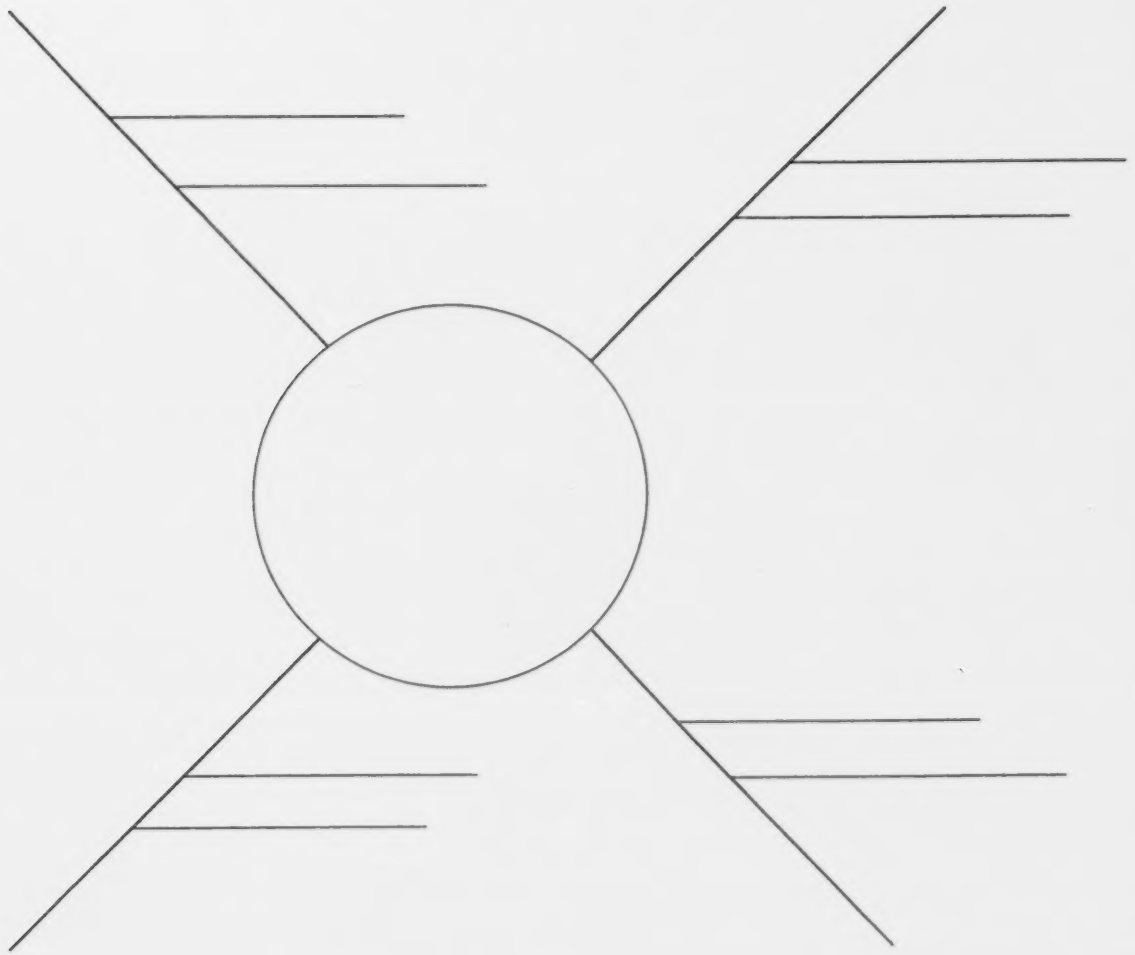
Krug, Samuel E. (1993). Examining the impact and cost effectiveness of a model inservice program for developing effective school leaders. Washington, DC: US Department of Education, Office of Educational Research and Improvement.

Ploghoft, Milton E., and Perkins, Claude G. (October 1988). Instructional leadership: Is the principal prepared? *NASSP Bulletin*, 23-27.

Section I: Activity 2
Handout—Graphic Organizer 1



Section I: Activity 2
Handout–Graphic Organizer 2



Section I: Activity 2
Notes–Major Responsibilities for Instruction

Broad categories of responsibilities for leaders of instruction

Participants should be given the opportunity to determine what they think the broad categories of responsibilities for leaders of instruction should be. For the trainer's information only, the following are some ideas based on research.

Categories from the "Standards for Principal and Assistant Principal Evaluation"

- Vision
- High student performance
- Safe and orderly schools
- Quality teachers, administrators, and staff
- Effective and efficient operation

Seven categories of instructional leadership

- Framing school goals
- Coordinating the curriculum
- Monitoring school progress
- Promoting professional development
- Promoting high expectations and standards
- Providing incentives for learning
- Supervising and evaluating instruction

(Hallinger and Murphy, "Instructional Leadership and School Socio-Economic Status: A Preliminary Investigation, " 1983)

Five central activities that most directly influence a school's instructional program

- Defining the school's mission
- Managing curriculum and instruction
- Promoting a positive learning climate
- Observing and giving feedback to teachers
- Assessing the instructional program

(Weber, "Leading the Instructional Program," in School Leadership: Handbook for Excellence, 1989)

Five broad dimensions within the "behavioral repertoire of successful school principals"

- Defining mission
- Managing curriculum
- Supervising teaching
- Monitoring progress
- Promoting instructional climate

(Krug, "Examining the Impact and Cost Effectiveness of a Model Inservice Program for Developing Effective Instructional Leaders," 1993)

Skills for successful school leaders fall into the following categories:

- Designing, implementing, and evaluating school climate
- Building support for schools
- Developing school curriculum
- Instructional Management
- Staff evaluation
- Staff development
- Allocating resources
- Educational research, evaluation, and planning

(Hoyle, English, and Steffy, Skills for Successful School Leaders, 1985)

Briggs-Carter Idea

- Planning, operation, supervision, and evaluation of educational programs

(Briggs-Carter, "Socialization of Prospective Principals as Instructional Leaders in the Era of 'School Reform': Anticipatory Deskilling and Reskilling in the Process of Becoming a Principal," 1991)

Harcher Research

"Key elements for successful instructional leadership include visioning, supervising and evaluating, forming close personal relationships, communicating, conducting meetings, initiating programs, and soliciting parent involvement."

(Harchar, "Collaborative Power: A Grounded Theory of Administrative Instructional Leadership in the Elementary School, " 1993)

Section I: Activity 2
Handout–Responsibilities of the Instructional Leader

Responsibility: _____

Legal Responsibilities	Essential Duties	Desirables/Others

Section I: Activity 2
Handout–Reflection Sheet

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION I: ACTIVITY 3

TIME	PURPOSE	SETTING	MATERIALS
45 minutes	• To review/reflect on what participants know and want to know about leadership styles • To provide a mini-lecture on leadership styles based on the K-W-L activity • To discuss situations where different leadership styles may be needed • To explain the Inventory of Leadership Practices and how it can be used	Whole Group Small Group	Handout—K-W-L chart Chart paper Markers Masking tape Notes—Leadership Styles Overhead projector Handouts/Transp.—Leadership Styles 1-11 Handout—Situations for Discussion Handout—-Inventory of Leadership Practices Handouts—- • Reflection Sheet • Individual Action Plan (from Section I: Activity 1)

Open with K-W-L activity

Handout—K-W-L chart
Chart paper
Markers

Give participants an opportunity to reflect on what they **know** about leadership styles and what they **want to know** about them.

These may be recorded on chart paper; a handout of a blank *K-W-L Chart* has been included for individual use. This is a whole-group activity.

Discuss leadership styles

Notes—Leadership Styles, including articles/research as listed
Overhead projector
Handouts/ Transparencies—Leadership Styles 1-11

Using what participants know and what they want to know about leadership styles, provide a mini-lecture on the topic to the whole group. Discuss various theories of leadership styles and the implications these have for the principal as instructional leader.

Articles/Other Research–

- *Leadership Styles*, Jo Ann Mazzarella and Stuart Smith.
- *Making Change Happen*, Jerry Herman and Janice Herman.
- *Taylor/Card Model: The Eight Styles of Leadership*, from Power Sown: Power Reaped, Raymond Taylor and Richard Card.
- *The Situational Leader*, Paul Hersey.

(See Bibliography for complete information necessary to locate articles.)

Answer questions

Answer any questions that the participants may have about the information shared.

Complete the situation exercise

Handout—Situations for Discussion

Ask participants to work in small groups of 3-4 people to discuss the Handout–*Situations for Discussion*. After discussing in small groups, ask one group to respond to each situation and give other groups an opportunity to add comments. Also allow individual groups to share their situations–per bottom of the Situation for Discussion handout.

Summarize the session using the L of the K-W-L activity

Chart paper (from earlier in the session)
Markers
Masking tape

Summarize points covered by returning to the K-W-L activity and completing the **What I Learned** section with the whole group.

Explain the Inventory of Leadership Practices

Handout—Inventory of Leadership Practices

Distribute the Handout–*Inventory of Leadership Practices*— explain that this is an optional activity to provide the participants additional information to assist in their leadership development. The instrument is to be completed by the administrators' respective faculties and returned in a sealed envelope to the administrator. In turn, the administrator may use these to revise his/her individual action plan.

Reflection/ Evaluation

Handouts—
1. Reflection Sheet
2. Individual Action Plan (from Section I: Activity 1)
3. Evaluation Form

Ask participants to use their reflection sheets to record thoughts, to revise their action plans as needed, and/or to complete evaluations of the session.

Other resources

Brewer, James H., Ainsworth, J. Michael, and Wynne, George E. (1989). *Power Management: A Three-Step Program for Successful Leadership*. Clinton, Mississippi: Associated Consultants in Education.

Cunard, Robert F. (April 1990). Sharing instructional leadership–a view to strengthening the principal's position. *NASSP*, 30-34.

Fullan, Michael G. (February 1992). Visions that blind. *Educational Leadership*, 49(5), 19-20.

Leithwood, Kenneth A. (February 1992). The move toward transformational leadership. *Educational Leadership*, 49(5), 8-12.

Sagor, Richard D. (February 1992). Three principals who make a difference. *Educational Leadership*, 49(5), 13-18.

Sergiovanni, Thomas J. (February 1992). Why we should seek substitutes for leadership. *Educational Leadership*, 49(5), 41-45.

The Video Journal of Education Series–
Transformational Leadership. With Larry Rowe.

- Program One–The Transforming Leader, 35 minutes
- Program Two–Empowering Staff and Students, 32 minutes

Section I: Activity 3
Handout—K-W-L Chart

What I **K**now	What I **W**ant to Know	What I **L**earned

Section I: Activity 3
Notes—Leadership Styles

Resource

The depth of coverage of this topic depends on the knowledge participants already have (which they will reveal through the **K-W-L** activity). Very likely, they will need only a brief synopsis. The following articles/ materials can be used for the discussion.

- Making Change Happen (1994), pages 7-16
- School Leadership Handbook for Excellence (1989), Chapter 2, pages 28-52
  Note the table of the "Comparison of Leadership Style Theories" on pages 44-45
- "Taylor/Card Model: The Eight Styles of Leadership," from Power Sown: Power Reaped (1985)
- The Situational Leader (1984), pages 62-63, 125

Research on leadership styles: broad categories

Handout/Transparency—Leadership Styles (1)

Early leadership research dealt with the characteristics/traits of good leaders. Later, the focus turned to leadership behavior.

Handouts/Transp.—Leadership Styles (1-3)

Handout/Transparency—Leadership Styles (2 & 3)

According to Mazzarella and Smith, the research on leadership styles can be divided into broad categories or dimensions such as **(1) how leaders make decisions** (example: autocratic, democratic, and laissez-faire); **(2) how they view human behavior** (example: employees need extrinsic motivators vs. employees as self-motivators); **(3) whether they emphasize tasks or human relations** (example: four styles emphasizing the four combinations of these/integrated–both, separated–neither, related–human side but neglects tasks, and dedicated–task-oriented but neglects human side); and **(4) how they bring about change in their organizations** (example: initiators, managers, responders).

Style depending on situation

Handouts/Transp.—Leadership Styles (4-7)

Handout/Transparency—Leadership Styles (4 & 5)

What is the ideal style? Authorities generally agree that the leadership style which is needed depends on the situation. Tannenbaum and Schmidt described three "forces" that the leader should consider in deciding how to manage: (1) forces within managers such as their value system, . confidence in subordinates, and security level; (2) forces within subordinates such as their readiness to assume responsibility and tolerance for ambiguity; and (3) forces in the situation such as the type of organization and the problem itself.

Handout/Transparency—Leadership Styles (6 & 7)

Other researchers determined that the leadership style a leader selects should depend on one primary aspect: the maturity of the follower (Philip Gates, Kenneth Blanchard, and Paul Hersey). According to these researchers, maturity of the follower encompasses three things: " the capacity to set high but attainable goals, a willingness and ability to take responsibility, and education or experience."

The Situational Leader

Handouts/ Transp.—Leadership Styles (8-10)

Handout/Transparency—Leadership Styles (8, 9, & 10)

In The Situational Leader, Dr. Paul Hersey describes leader behavior in four ways: (1) high task and low relationship–**Telling**, (2) high task and high relationship–**Selling**, (3) high relationship and low task–**Participating**, and (4) low relationship and low task–**Delegating**. He then matches these leader behaviors with the readiness level of the followers this way: (1)unable and unwilling or insecure–**use the Telling style/"provide specific instructions and closely supervise performance"**, (2) unable but willing or motivated–**use the Selling style/"explain decisions and provide opportunity for clarification"**, (3) able but unwilling or insecure–**use the Participating style/"share ideas and facilitate followers in decision making"**, and (4) able and willing or motivated–**use the Delegating style/"turn over responsibility for decisions and implementation."**

Section II: Planning

Conclusion

Handout/Transp.—
Leadership Styles (11)

Handout/Transparency—Leadership Styles (11)

What does all of this mean? How does knowing about theories of leadership styles help you? As Mazzarella and Smith summarized, "Because leadership by definition includes action, any theory of leadership is helpful only if it can be used to guide action" (School Leadership Handbook for Excellence, p. 37).

Are you able to vary your leadership style with the situation? Does one style work for you in all instances?

LEADERSHIP STYLES

Leadership Research

- Earlier research–Characteristics/traits of good leaders
- Later–Focus on leadership behavior

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Broad Categories or Dimensions of Research on Leadership Styles

- How leaders make decisions (ex.: autocratic democratic, laissez-faire)
- How leaders view human behavior (ex.: employees need extrinsic motivators vs. employees as self-motivators)

63 64

Broad Categories . . . on Leadership Styles (cont.)

- Whether leaders emphasize tasks or human relations (ex.: four combinations of task/human behaviors, such as integrated, separated, related, and dedicated)
- How leaders bring about change in their organizations (ex.: initiators, managers, responders)

Section I: Activity 3
Handout/Transparency—Leadership Styles (4)

What is the ideal leadership style?

~~~~~~~~~~

The leadership style needed depends on the situation.

67

68
~~~~~~~~~~

Three forces that the leader should consider in deciding how to manage

Forces within managers (e.g., their value system, confidence in subordinates, security level)

Forces within subordinates (e.g., readiness to assume responsibility, tolerance for ambiguity)

Forces in the situation (e.g., type of organization, the problem itself)

Tannenbaum and Schmidt

The primary aspect that a leader should consider in selecting a leadership style: the maturity of the follower.

Researchers define maturity of the follower as encompassing three things:

- **"the capacity to set high but attainable goals,"**
- **"a willingness and ability to take responsibility,"**
- **"education or experience."**

(Gates, Blanchard, Hersey–see Mazzarella & Smith, in <u>School Leadership Handbook</u>, p. 37)

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Section I: Activity 3
Handout/Transparency—Leadership Styles (8)

- **Four types of leadership behavior**
- **High task and low relationship: Telling**
- **High task and high relationship: Selling**
- **High relationship and low task: Participating**
- **Low relationship and low task: Delegating**

The Situational Leader
Dr. Paul Hersey

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Hersey then matches the leader behaviors with the readiness level of the followers. For example, if the follower is:

- **unable and unwilling or insecure, the leader should use the Telling style/"provide specific instructions and closely supervise performance."**

- **unable but willing or motivated, the leader should use the Selling style/"explain decisions and provide opportunity for clarification."**

77

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- **able but unwilling or insecure, the leader should use the Participating style/"share ideas and facilitate followers in decision making."**

- **able and willing or motivated, the leader should use the Delegating style/"turn over responsibility for decisions and implementation."**

What does all of this mean?

"Because leadership by definition includes action, any theory of leadership is helpful only if it can be used to guide action." (Mazzarella & Smith, p. 37)

Are you able to vary your leadership style with the situation? Does one style work in all instances for you?

S1

S2

Section I: Activity 3
Handout—Situations for Discussion

Discuss these situations in small groups of 3-4 people. Be ready to share with the whole group.

1. The principal notices that some of the teachers post objectives, have fully developed lesson plans aligned to the Standard Course of Study, etc., while others do not. What should the principal do to ensure that all of the teachers are teaching the SCS? Should the principal use the same leadership style with all of the teachers?

2. Mrs. Jones is an excellent teacher who has been at the school for 15 years. However, she always declines leadership positions (e.g., School Improvement Team chairperson, grade-level chairperson, etc.). Her philosophy, as she puts it, is "just let me go to my classroom and teach." How should the principal handle this situation?

3. The principal has facilitated staff development on test taking strategies and required that all grades complete practice tests in preparation for the state testing. Even though one of the school's veteran teachers attended the staff development and gave his class the required practice test, he refused to take these test preparation strategies seriously, and his students did not do as well on the end-of-grade tests as the principal thinks they could have. What should the principal do?

4. All classrooms have been equipped with computers; however, only a few teachers are using them for instruction. All staff members have completed required computer training. When questioned, the teachers responded with a variety of answers: "I don't have the right software"; "the students know more about the computers than I do"; and "computers are a waste of time." What leadership style(s) and strategy/strategies should be used?

In your small groups, pick 1 or 2 situations of your own which may require different leadership approaches/styles. Discuss solutions, and be ready to present to the whole group.

Section I: Activity 3
Handout–Inventory of Leadership Practices

INVENTORY OF LEADERSHIP PRACTICES

(Directions for Faculty Member)

The administrator named on the following sheet is participating in this Inventory of Leadership Practices. Faculty members are asked to list his/her leadership strengths and weaknesses.

Instructions: For confidentially please type or print your responses. Also, please do not use statements, such as "This is my first year…" or "When she observed my French class…," that may identify you.

A. **Section I** lists four practices and their identifying behaviors common to successful leaders. Please rate this administrator on each behavior using the following scale:

0 = Not applicable/I do not know
1 = Never
2 = Occasionally
3 = Frequently
4 = Almost always
5 = Always

B. **Section II** asks you to list this administrator's strengths and weaknesses.

C. **Section III** lists 20 characteristics of successful leaders. Please check the 8 that you admire most in this administrator. This forced ranking will result in 12 characteristics not being marked.

D. When you complete the assignment, put this form in the enclosed envelope, seal it with scotch tape and give it to the secretary by _____. All surveys will be collected and submitted to the facilitator at the same time.

Thank you for participating in this assessment of this administrator's leadership strengths and weaknesses.

Section I: Activity 3
Handout–Inventory of Leadership Practices

Name of Administrator: _____ **School:**_____

Section I. Please read the description for each leadership practice and then rate this administrator on each item using the following scale:

0 = Not applicable/I do not know
1 = Never
2 = Occasionally
3 = Frequently
4 = Almost always
5 = Always

0	1	2	3	4	5	**Attitude toward work:**
						Takes responsibility
						Has a professional attitude and approach to the job
						Stays up-to-date on educational research and practices
						Communicates a positive and hopeful outlook for the school
						Tries new approaches even when there is a chance he/she may fail
0	1	2	3	4	5	**Effectiveness as a person:**
						Exhibits sensitivity, empathy and acceptance necessary for establishing rapport
						Functions in an organized manner
						Respects the individual
						Develops cooperative relationships with his/her colleagues
						Is professionally ethical
						Practices the values he/she espouses
0	1	2	3	4	5	**Effectiveness with teachers:**
						Is sensitive to the role and problems of the teacher
						Communicates easily and effectively with teachers
						Functions effectively as a resource consultant in matters of curriculum, student activities and human interaction as well as the concerns for psychological climate surrounding learning experiences
						Attends to, follows through and reports back on teacher referrals of several types
						Makes effective use of the individual teacher's capacity and talent
						Judges teacher's work fairly and is effective in teacher supervision
0	1	2	3	4	5	**Models the way:**
						Expresses his/her philosophy of leadership
						Creates an atmosphere of mutual trust
						Involves others in planning
						Fosters high expectations
						Provides leadership in faculty meetings to challenge and stimulate staff's professional growth
						Does things he/she says he/she will do
						Recognizes individuals for their contributions to the success of projects

Section II. Most of us improve or change our behaviors when we receive helpful feedback from our colleagues. Knowing our weaknesses often is more helpful than knowing our strengths. Please list up to five strengths and five weaknesses you observe in this administrator.

Strengths	Weaknesses
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Section III. The list below gives 20 characteristics of successful leaders. Please check 8 that you admire most in this administrator. This forced ranking will result in 12 characteristics not being marked. Please feel free to make helpful comments.

CHARACTERISTICS	COMMENTS
_____ Ambitious	
_____ Broad-minded	
_____ Caring	
_____ Competent	
_____ Cooperative	
_____ Courageous	
_____ Dependable	
_____ Determined	
_____ Fair-minded	
_____ Forward-looking	
_____ Honest	
_____ Inspiring	
_____ Intelligent	
_____ Imaginative	
_____ Independent	
_____ Loyal	
_____ Mature	
_____ Self-controlled	
_____ Straightforward	
_____ Supportive	

Section I: Activity 3
Handout—Reflection Sheet

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____ _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. **What was the most useful part of this session?**

•

2. **What did you learn from this session?**

•

3. **How will this help you in your position?**

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION I: ACTIVITY 4

TIME	PURPOSE	SETTING	MATERIALS
2 hours	• To read three articles on vision/mission in order to learn their significance for instructional leaders • To assist instructional leaders in developing their "personal" vision/mission statements	Table Groups Whole Groups	Transp.—Viable School Leaders Handout—Mind Mapping Notes—Vision/Mission Transp.—What Do You Need to Carry Out a MISSION? Transp.—Attention through Vision Overhead Projector Chart Paper Markers Tape

Set the task

Explain the Jigsaw procedure to participants. Each table will be assigned one of the articles and decide how it is to be divided among the group members. Participants are responsible for reading the assigned sections, learning it and becoming an "expert" on the content. Each table group plans how they will teach the material to the Whole Group. Other groups are responsible for learning the material when it is taught to them.

Jigsaw exercise

Assign the articles below as a jigsaw activity. Participants should be given time to research articles and prepare presentations.

Articles—

- *If You Can Envision It, You Can Create It*, Joan Richardson.
- *Start with a Good Plan to Achieve Your Vision*, Bob Vojtek and Rosie O'Brien Vojtek.
- *Why Change Doesn't Happen and How to Make Sure It Does*, Charles Schwahn and William Spady.

(See Bibliography for complete information necessary to locate article.)

Overhead Projector
Transparency
Chart Paper
Markers

During presentations, record important points on a transparency or chart paper. Encourage note-taking for future reference.

Develop "personal" vision/mission

Transparency—Viable School Leaders

Handout—Mindmapping

Participants will discuss the Bennis and Nanus quotes on Viable School Leaders at their tables.

Using this as a springboard, ask each participant to **mind map** (distribute Handout—*Mind Mapping* for directions) his/her ideal school. Post and share mind maps.

Give participants the opportunity to reflect briefly on the articles they read previously. Pose the question: "Are visions and missions the same thing?" Define "vision " and "mission." (See Notes—Vision/Mission.)

Return to the Bennis and Nanus quote: "Create an appropriate and compelling vision." Tell the group to use their mind maps to write a personal vision for their school. Share and critique visions at each table. Select one person to share his/her vision with the whole group.

Transparency—What Do You Need to Carry Out a MISSION?

Display Transparency—*What Do You Need to Carry Out a MISSION?*—and share Trainer Notes with the participants. Answer questions as needed.

Chart Paper
Markers
Tape

Closure

Transparency—Attention Through Vision

Show Transparency—*Attention Through Vision* —and give participants an opportunity to reflect on poem. Guide discussion by having participants determine how the poem impacts on their roles as instructional leaders.

Summary

Summarize major points covered during the activity and answer any questions participants may have.

Evaluation

If this activity is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section I: Activity 4
Transparency—Viable School Leaders

- Create an appropriate and compelling vision.
- Show how the management of meaning translates into the requisite social architecture that can enable the school to realize its vision.
- Know how to position the school correctly in the outside world.
- Are dedicated to managing him/herself through learning and realize that the school is a group of people united in the *never-ending process of learning.*

Leaders
Warren Bennis and Burt Nanus

Section I: Activity 4
Handout—Mind Mapping

MIND MAPPING

- Start in the center of the page with the topic idea.
- Work outward in all directions producing a unique pattern that reflects your mind's unique habits.
- Have well-defined clusters and sub-clusters, keeping to between five and seven groupings.
- Use keywords and images.
- Use color imagery and 3-D perspectives in your symbols.
- Print the words rather than write them for more distinct and memorable images.
- Put the words on the line, not at the end of the lines.
- Use one word per line.
- Make the pattern noteworthy, even odd. (The mind remembers things that stand out.)
- Use arrows, colors, designs, etc. to show connections.
- Use personal short-forms, codes for fun and effectiveness.
- Be spontaneous, creative and original, and by all means, have fun!

Section I: Activity 4
Transparency—
What Do You Need to Carry Out a MISSION???

Delay of Gratification

~~~ **A Sense of Responsibility**

~~~ **Dedication to Reality**

Balancing

~~~ **Proper Use of Power and Authority**

~~~ **Love**

Emotional Wisdom

Leadership
John R. McCall

Section I: Activity 4
Notes—Vision/Mission

What Do You Need to Carry Out a MISSION?

McCall refers to the following as being "tools" to carry out the mission. A principal must have the ability to translate intention into reality if he/she is to redirect the school. The principal must have a **vision**—a mental image of a possible and desirable future state of the school. The vision needs to be realistic, credible, attractive and attainable.

Delay of Gratification

Because it is very demanding to help self and others change, principals often have to **delay their joy for others or for the good of the future.** This requires self-discipline, restraint and dignity and should be modeled by the leader. When this is done by the principal, it exerts great influence on teachers and students. **Ask participants to share situations in which they delayed personal gratification for the good of the school.**

A Sense of Responsibility

See quotes from the previous Transparency—*Viable School Leaders* (Bennis and Nanus). The principal is responsible for creating a vision and the "social architecture" for enabling the school to realize its vision. **Tell the participants to rate themselves on a scale of 1—10, to denote their own level of responsibility.** (This should not be shared with the group.)

Dedication to Reality

Principals should understand the "three big Cs"—**Commitment, Consistency** and **Challenge.** This requires the leader to be able to handle present problems in such a way as to avoid problems in the future. Another way of looking at this:

1. Respond to the future
2. Reach out for and share uncertainty
3. See errors as stepping stones, not stumbling blocks
4. Be adept at interpersonal relationships/communication
5. See ways to gain self-knowledge

From *The Provident Principal* (McCall)

Balancing	Balancing ensures that the principal does not go overboard, but remains flexible. It is a trait that must be carefully orchestrated. At times, it will be necessary to make decisions based on opposing views, e. g. to tell or not to tell; to express or suppress anger; or to forget ourselves and give over to the needs of others. Leaders must constantly make either/or decisions. **Ask participants to share personal experiences that required balancing.**
Proper Use of Power and Authority	The principal should be self-disciplined and able to influence others to join in. Power and authority are used subtly and constructively. **Political power** is the ability to coerce others. **Personal power** is self-disciplined consciousness (awareness) that moves others to join in with the leader and the enterprise.
Love	The ability to extend one's self to others; giving attention to self and others (nurturing). **Define love.**
Emotional Wisdom	The principal's ego is intact and positive self-regard exists. As a result, the principal can create in others a sense of confidence and high expectations. This lends itself to the ability to trust, even if the risk is great.

Attention Through Vision

All men dream, but not equally,

Those who dream by night in the dusty recesses of their minds

Awake to find that it was vanity;

But the dreamers of days are dangerous men,

That they may act their dreams with open eyes to make it possible

-T. E. Lawrence

SECTION II: ACTIVITY 1

TIME	PURPOSE	SETTING	MATERIALS
1 hour	• To commit advance thought to the planning process • To heighten consciousness of how time is spent • To provoke a re-evaluation of time planning	Individuals Partners/Pairs Table Groups Whole Group	Handout—Time Log Sheet Handout—Time Log: Analysis Sample Chart Paper Magic Markers Masking Tape Handout—Pie Chart Sample Handout—Time Management Style Audit Transp.—The Master Time Manager Overhead Projector

Prior Assignment

Handouts—
Time Log
Time Log Analysis Sample

Prior to the presentation of this section, have participants complete the Handout—*Time Log*—for a two-week period indicating how they actually spent their time. (Participants will need to make ten copies of the Time Log.) At the end of the ten working days, they should complete the Handout—*Time Log Analysis*— and bring it to this session.

Describe activity

Chart Paper
Magic Markers
Masking Tape

Ask participants at each table to share strategies that they frequently use in managing time. Write strategies on chart and put a star beside the three (3) strategies that are used most frequently. Post charts and discuss only the three strategies that are starred. The facilitator should ask questions about those strategies, e.g., "Why do you use this strategy?" or "Tell us about your success rate when you use this strategy?" Determine the most frequently used strategy for the Whole Group.

Graphic display of data

Pie Chart Sample

Ask participants to display the data from the Handout—*Time Log Analysis*—in graphic form in a pie chart or a graphic organizer of their choosing. Each person shares the pie chart (or other graphic) with the Table Group.

Data analysis

Participants review their *Time Logs* with a partner and give consideration to patterns that emerged. Use the following questions to guide this discussion:

- How was most of your time spent?
- Which activities produced the greatest benefits?
- Which activities produced the fewest benefits?

Complete audit

Tell participants that they will have another chance to analyze their time management styles by completing the Handout—*Time Management Audit*.

Handout—
Time Management
Audit

Reflection Question: "What changes will I make in managing my time?"

Closure

Transparency—
The Master Time
Manager. . .

Bring the session to closure by displaying the Transparency—*The Master Time Manager. . . .* Answer questions, if there are any. Tell the participants that the focus up to this point has been of a personal nature. A future focus will be to examine how time is used in the school by teachers, other staff members and students.

Summarize session

Summarize major points covered during the session and new learnings/viewpoints as a result of the content of this session. Answer any questions participants may have regarding session content.

Evaluation

If this session is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

(Activities in this section were adapted from *The Self-Made Leader—25 Structured Activities for Self-Development.* Mike Woodcock and Dave Francis)

Section II: Activity 1
Handout—Time Management/Scheduling

Time Log

Directions: Two weeks prior to attending the session on Time Management/Scheduling, keep a log of how you actually spend your time day-by-day over the next ten working days. Make ten copies of the log sheet and keep records as indicated. At the end of the ten days, complete the Time Log Analysis as shown.

Date_____

Time	Activities Being Undertaken	Benefits of These Activities
7:00 a.m.		
7:30 a.m.		
8:00 a.m.		
8:30 a.m.		
9:00 a.m.		
9:30 a.m.		
10:00 a.m.		
10:30 a.m.		
11:00 a.m.		
11:30 a.m.		
12:00 noon		
12:30 p.m.		

Section II: Activity 1
Handout—Time Management/Scheduling

Time Log, Page 2

Time	Activities Being Undertaken	Benefits of These Activities
1:00 p.m.		
1:30 p.m.		
2:00 p.m.		
2:30 p.m.		
3:00 p.m.		
3:30 p.m.		
4:00 p.m.		
4:30 p.m.		
5:00 p.m.		
5:30 p.m.		
6:00 p.m.		
6:30 p.m.		
7:00 p.m.		
Later		

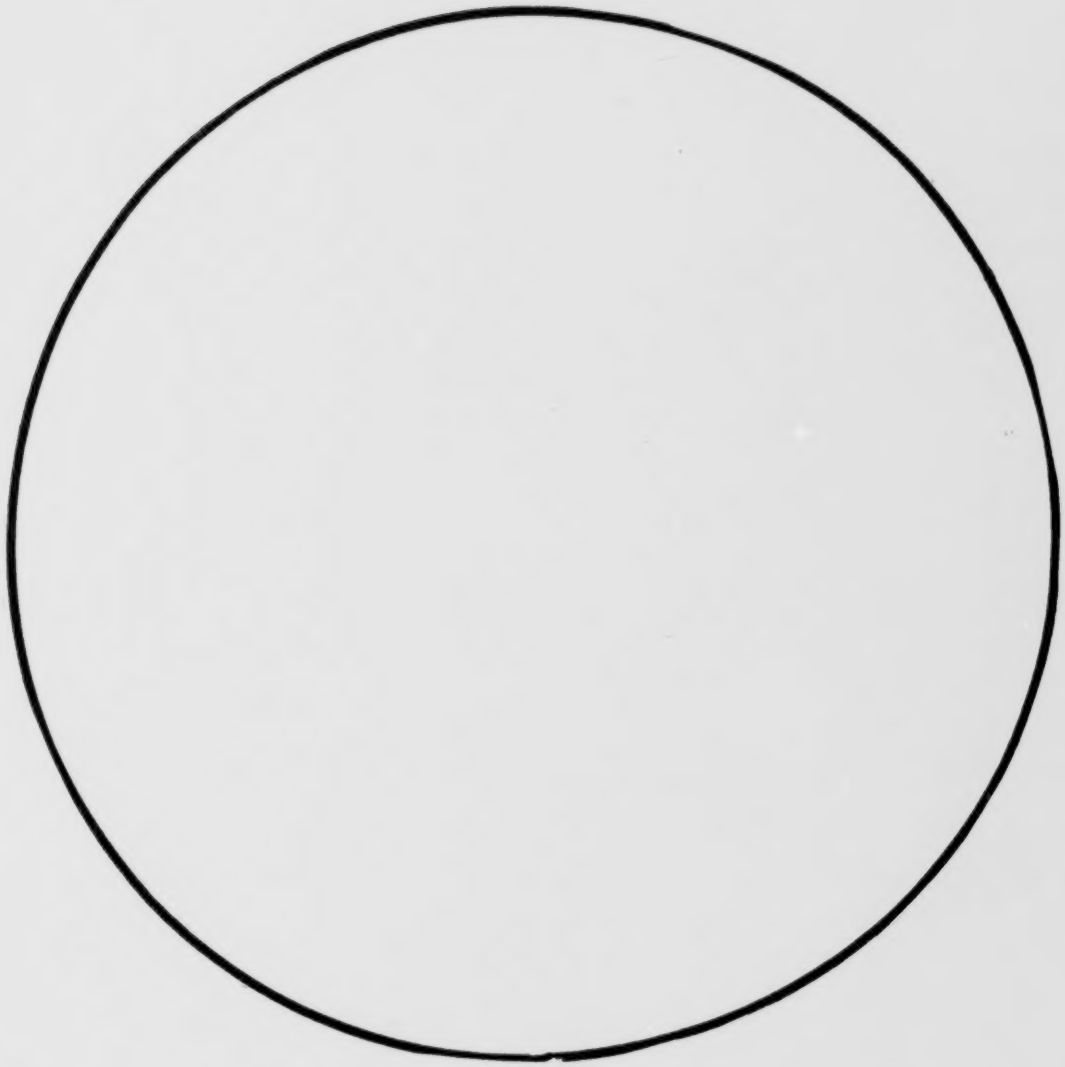
Section II: Activity 1
Handout—Time Log: Analysis (Sample)

Directions: Take the data you have accumulated on your Time Logs and complete an analysis as shown in the example below. Include all of the activities and rank them in frequency order. Use your own definitions of activities. Then complete the pie chart display.

Analysis Sample

Activities	Number of Entries	Total
Direct student contact	IIIII IIIII IIIII IIIII III	23
Observing teachers	IIIII IIIII IIIII IIII	19
Working with mentors/novices	IIIII IIIII IIIII II	17
Meeting with team leaders	IIIII IIIII III	13
Reviewing lesson plans	IIIII III	8
Meeting with the superintendent	IIIII I	6

Section II: Activity 1
Handout—Pie Chart Sample



Section II: Activity 1
Handout—Time Management Style Audit

Directions: Respond to each item on the audit by circling the appropriate number on the continuum, which ranges from **Totally Untrue** to **Totally True**.

1. I regularly review how my time is spent.

Totally Untrue	1	2	3	4	5	Totally True

2. I feel that I have full control over how I spend my time.

Totally Untrue	1	2	3	4	5	Totally True

3. I carefully plan in advance how I will spend my time.

Totally Untrue	1	2	3	4	5	Totally True

4. I keep to my time plans.

Totally Untrue	1	2	3	4	5	Totally True

5. I keep wastage of time to an absolute minimum.

Totally Untrue	1	2	3	4	5	Totally True

6. I do not allow others to waste my time.

Totally Untrue	1	2	3	4	5	Totally True

7. I spend most time on achieving my key objectives.

Totally Untrue	1	2	3	4	5	Totally True

8. I insist that other people present me with concise information and proposals.

Totally Untrue	1	2	3	4	5	Totally True

Section II: Activity 1
Handout—Time Management Style Audit

Page 2

9. I am rarely bored at work.

Totally Untrue	1 2 3 4 5	Totally True

10. I do not allow myself to get extremely tired.

Totally Untrue	1 2 3 4 5	Totally True

11. I balance work time and leisure time extremely well.

Totally Untrue	1 2 3 4 5	Totally True

12. I make time for things that I really enjoy.

Totally Untrue	1 2 3 4 5	Totally True

13. I am alert to opportunities and will reallocate time according to the needs of the situation.

Totally Untrue	1 2 3 4 5	Totally True

14. I feel that I am making real progress in my career.

Totally Untrue	1 2 3 4 5	Totally True

15. I feel capable of making substantial changes in my personal management of time.

Totally Untrue	1 2 3 4 5	Totally True

THE MASTER TIME MANAGER...

- Knows where time is spent
- Sets clear personal and work objectives
- Plans how to invest time to meet objectives
- Does not allow others to become thieves of time
- Is personally efficient
- Delegates everything possible
- Does things once
- Does things well
- Keeps time for learning and relaxation
- Watches how others spend time and learns to improve

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

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SECTION II: ACTIVITY 2

TIME	PURPOSE	SETTING	MATERIALS
2 hours	• To help instructional leaders identify areas in their school schedules that need revising • To assist instructional leaders in organizing school time in an efficient manner so as to ensure effective instruction and learning	Table Groups Whole Group	Notes—Role Play Cue Cards 3x5 Index cards Transp.—Consider the Following Transp.—Class Schedule Transp.—Tips on Using Scheduling to Support Student Learning Chart Paper Magic Markers Masking Tape Overhead Projector

Lead activity

The problem: Scheduling conflicts regarding utilization of materials, equipment and space.

Role-Play Cue Cards

Assign participants as characters for the role play, asking the remainder to be observers. Explain that the scenario will focus on how "not" to resolve the conflict. In the discussion that follows, "a possible solution" for the resolution of the scheduling conflict should be generated by the observers.

During the role play, observers should consider the following:

- By whom should the conflict be resolved?
- How can commonly used materials, space and equipment be utilized in an efficient manner?

Examine master schedules

Transparency—Consider the following

Participants are asked to bring a copy of their school's master schedule and several teacher-generated schedules to this session. Place the Transparency—*Consider the Following*—on the overhead to serve as a guide for partner discussion. Tell participants to examine **master schedules** by considering the following:

- Is there evidence of students' learning characteristics impacting on the schedule?
- Is there common planning time for grade-level teachers, teaching teams, "special" and itinerant teachers and other special groups?
- Are "specials" and itinerant teachers scheduled in an efficient way?

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- What can be done to prevent conflicts in the utilization of space, equipment and materials?

Transparency—Class Schedule Mrs. Jane Doe 4th Grade

Show Transparency—*Class Schedule Mrs. Jane Doe 4th Grade*. Give each table group time to review and discuss the schedule. Ask participants:

- "How would you rate this schedule on a scale of 1—5?
- "What makes this a 'good' or 'bad' schedule?"

After approximately ten minutes, pose the same questions to the whole group, with one person at each table responding for the group.

Note: This is an authentic schedule submitted by a fourth grade teacher in a low-performing school.

A major problem with this schedule is its inadequate amount of instructional time. **The schedule does not contain a minimum of 5.5 hours for instruction**. Even though time was slated for a tutor, one was not employed by the school. The time slot from 2:30 — 3:00 was used for clean-up and preparation for leaving. Rarely was it used for Drop Everything And Read.

Group exercise Revise Schedule

Chart Paper
Magic Markers
Masking Tape

Tell participants that they will revise Mrs. Doe's schedule. Mrs. Doe has been assigned a class of students, the majority of which are in Levels I and II on the *NC End-of-Grade Tests* in both mathematics and reading. Of the twenty-six students in this class, three (3) are Learning Disabled (LD) in reading and five (5) are Educable Mentally Handicapped (EMH). Those who are LD spend one hour out of the classroom daily and the latter group is out for no more than two hours each day. Place the revised schedule on chart paper and post.

Rationale for revision

Select two participants to conduct a simulated teacher/principal conference in order to explain the rationale for one of the revised schedules.

Tips on using scheduling to support student learning

Transparency—Tips on Using Scheduling to Support Student Learning

Display Transparency—*Tips on Using Scheduling to Support Student Learning*—on the overhead. Ask participants to give examples of how schedules in their schools support student learning.

Reflections

Ask participants to respond to these questions. Afterwards, each participant should collect answers from three different people. At the end, participants share their best-liked answer to one of the questions with the entire group.

- "How can the principal keep instructional time inviolate?"
- "How do you monitor student use of time?"
- "What suggestions would you offer a beginning principal?"

Summarize session

Summarize major points covered during the session and new learnings/viewpoints as a result of the content of this session. Answer any questions participants may have regarding session content.

Evaluation

If this session is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section II: Activity 2
Notes—Role-Play Cue Cards

How Not to Solve a Scheduling Conflict

Directions: Depending upon the size of the group, select from three to eight participants for the role-play. Roles should be designated to show the development of a hostile environment over a scheduling issue. The group spends time arguing and yelling at each other about "what is right for ME and MY CHILDREN." In each scenario, a person should be designated as the principal/instructional leader. Select the conflict(s) you would like to use. Place on 3" x 5" cards for the participants. The presenter decides whether the conflicts should/should not be resolved during the role-play. If they are not resolved, then ask the observers to suggest ways in which resolution could have occurred.

Conflicts:

Two teachers have been assigned to use the multi-purpose room at the same time.

Two teachers have planned a field experience for their students. Some of their students are in a third teacher's room who refuses to dismiss them to go on the field trip.

One grade group would like for all assembly programs and special events to occur during their planning period so that their students will not miss any of their classes.

One teacher needs to use the laminating machine. When she enters the workroom it is not there. After investigating, the machine is found in another teacher's room.

One bus driver is an alternate for two regular bus drivers. On a given day, both regular drivers are not available to drive their assigned buses after school.

Feel free to include other real-life situations in this activity.

Section II: Activity 2
Transparency—Consider the Following

- Is there evidence of students' learning characteristics impacting on the schedule?
- Is there common planning time for grade-level teachers, departments, teaching teams, "special" and itinerant teachers or other special groups?
- Are "specials" and itinerant teachers scheduled in an efficient way?
- What can be done to prevent conflicts in the utilization of space, equipment and materials?

Section II: Activity 2
Transparency—Class Schedule

CLASS SCHEDULE
MRS. JANE DOE, 4TH GRADE

7:45-8:00	MORNING ACTIVITIES
8:00-8:40	EXPLORATORY TIME
8:40-9:15	TUTOR—BATHROOM
9:15-10:40	LANGUAGE ARTS
10:40-11:55	MATH
11:55-1:00	LUNCH—SNACKS—BREAK
1:00-1:45	SOCIAL STUDIES
1:45-2:30	SCIENCE
2:30-3:00	SILENT READING

Section II: Activity 2
Transparency—Tips on Using Scheduling to Support Student Learning

- Involve your teachers so that scheduling helps students reach maximum performance
- Look at every minute of the school day for wasted time
- Consider scheduling concurrent enrichment, remediation and other special help activities
- Build in planning time for staff—grade/subject levels and cross grade
- Minimize classroom interruptions; schedule all announcements for one time a day

Section II: Activity 2

Transparency—Tips on Using Scheduling to Support Student Learning

Page 2

- Vary times for assemblies and field trips

- Make sure your schedule reflects your School Improvement Plan's goals

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

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SECTION II: ACTIVITY 2
Optional Activity—Data Analysis
(For Additional Information, Refer to Skill Packet on DATA ANALYSIS)

TIME	PURPOSE	SETTING	MATERIALS
2 hours	• To provide instructional leaders with a framework for analyzing data that supports school improvement	Individuals Whole Group	Copies of data from participants' schools ABCs of Public Education Growth and Performance Report School Improvement Plan Chart paper Markers Handout—Data Analysis: Guiding Questions

Describe exercise

Handout—Data Analysis: Guiding questions

Participants are expected to collect and analyze data from their schools that impact on school improvement. During the analysis portion of the activity, participants are expected to determine the discrepancies between where the school should be and where the school actually is. An important part of this process is to help participants understand the relationship between the data and whether school improvement has or has not occurred. A set of Guiding Questions is included. Principals may wish to include other school administrators, the School Improvement Team, counselors and other staff persons in this activity.

Review of school improvement documents

School Improvement Plan
ABCs of Public Education Growth and Performance Report

Principal and the School Improvement Team should review the School Improvement Plan and the *ABCs of Public Education Growth and Performance Report* for the school. Note areas of growth and decline. Ask the participants to determine the following:

- **Was adequate growth achieved?**
- **Were the objectives of the School Improvement Plan met?**
- **What gains will the school have to make in order to change its status—from adequate performance to exemplary performance to a school of distinction—at the end of the school year?**

Review disaggregated data

End-of-Course/End-of-Grade Test Data

Participants should review the disaggregated End-of-Course/End-of-Grade test data (test objectives, race, gender, and performance level) for each teacher. From this information, establish instructional targets and share with teachers. The principal or his/her designee may do this one-on-one or in grade group/departmental meetings.

Determine other data that can be collected and analyzed

Ask the participants to brainstorm a list of data topics that should be collected and analyzed. Determine what will be needed, its source and who will collect it. Also indicate a deadline.

Once data has been collected and analyzed, ask the participants to share it in graphic form with the School Improvement Team and/or entire staff. With the principal acting as facilitator, goals and targets should be set by the larger body.

Topics/Subjects for Consider:

Student Achievement (EOC/EOG test data as well as grades given by teachers, mock /benchmark tests)
Attendance (Student and Staff)
Graduation Rates
Retention Rates
Disciplinary Actions
Parental Involvement
Mobility (Student and Teacher)
Professional Development
Student Grades (Pass/Fail rates, students who are failing more than one subject, etc.)

Using the data

Participants should decide the best way for the data to be used and who will be responsible for monitoring its use. Periodic updates should take place at least quarterly, if not more frequently. **Key: Participants should understand the relationship between the data collected and analyzed, and the school's progress toward reaching its improvement goals.**

Answer questions

Answer any questions participants may have regarding session content.

Summarize session

Summarize major points covered during the session and new learnings/viewpoints as a result of the content of this session.

Evaluation

If this session is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section II: Activity 2
Handout—Data Analysis (Optional)

Guiding_Questions

The school-wide improvement process requires a school to examine itself very closely. Using the data analysis process, it is critical that the school determine where it is in relation to where the school should be. To accomplish this, an examination should be made of all data that impacts on improvement. In analyzing test scores, ask the following:

- How does this year's performance compare to last year's ? The previous year? Were any changes noted? Why did the changes occur?—Are the students or curriculum different?
- How do your school results compare with district (LEA) and state results?
- What percentage of your students scored in Levels III and IV on the End-of Grade/End-of-Course tests? What percentage scored in Levels III and IV in the district? When the data are disaggregated by gender, ethnicity or family income level, are the percentages the same in Levels I and II?
- What percentage of the students took the Scholastic Aptitude Test? What percentage fell in the lowest and highest ranges? How does this compare with previous years?
- How many of your high school students took Advanced Placement exams? How many scored three or better? Have more students been taking these exams in the last three years? Have the scores been getting better or worse?
- Do the EOG/EOC tests measure what is being taught in your school? If not, why?
- How will your school address the needs of low-performing students at your school?
- What improvement targets are you planning to set?

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
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3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION II: ACTIVITY 3

TIME	PURPOSE	SETTING	MATERIALS
30 minutes	• To introduce the Planning for Student Achievement sessions • To discuss motivation and high expectations • To determine strategies for motivating/ establishing high expectations for students and staff	Whole Group Small Group	Articles on motivation and high expectations listed below Handout—Strategies Overhead projector Handout/Transp.—Overview Chart paper Markers Masking tape Notes–Seven Correlates Transp.—Characteristics Handout—List of Variables Handouts—Reflection Sheet

Prior reading/ homework

Articles as listed
Handout—Strategies for Motivating/Establishing High Expectations (Homework)

Ask the participants to read the Article—*Motivation Begins With You*—and at least three of the other articles on motivation and high expectations prior to coming to the session. Explain that they should also complete Handout—*Strategies for Motivating/ Establishing High Expectations*—as homework and be ready to discuss their work with the group.

Articles–

- *Motivation Begins With You*, Judy-Arin Krupp.
- *The Agenda: The Achievement Agenda for Middle Level Schools*, Ronald Williamson, J. Howard Johnston, and Laurel Martin Kanthak.
- *15 Strategies for Motivating Students*, J. Michael Palardy.
- *Freeing Teachers of Extra Duty*, Les Potter.
- *Hard Work and High Expectations: Motivating Students to Learn*, Tommy Tomlinson.
- *Keys to the Might of Motivation*, Ann T. White.
- *Motivation, School Climate, and Diverse Learning*, Tom Gunning, Max Heinz, B. R. Rhoads, and Joyce Watkins.

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Prior reading/ homework, contd.

- *Principals as Leaders of Leaders*, David Parks and Thomas Barrett.
- *Principals Can Make a Difference*, Ronald G. Joekel, Frederick C. Wendel, and Fred A. Hoke.
- *Raising Expectations to Improve Student Learning*, Jerry D. Bamburg.

(See Bibliography for complete information necessary to locate articles.)

Introduce broad topic on Planning for Student Achievement

Overhead projector
Handout/Transp.—Overview ...

Introduce this and the next sessions under the broad topic of **Planning for Student Achievement: What the Instructional Leader Can Do** using the Handout/Transparency—*Overview of Planning for Student Achievement: What the Instructional Leader Can Do.*

Introduce session on high expectations and motivation

Chart paper
Markers
Masking tape
Notes—Seven Correlates
Transp.—Characteristics of Top 25 Schools
Handout—List of Variables

Open this activity with a brief discussion of the seven correlates of effective schools, high- vs. low-performing schools, Top 25 Schools document, etc., to establish the importance of high expectations in student achievement and school improvement. (See Notes–*Seven Correlates.*) Ask the participants to name as many of the seven correlates as they can. Record these on chart paper. Then show the Transparency—*Characteristics of Top 25 Schools*— and/or refer participants to the Handout—*List of Variables.*

The following resources were used for the overview of the characteristics of effective/high-performing schools:

- A Guide to the School Improvement Process based on Effective Schools Research, Lawrence Lezotte and Barbara C. Jacoby.
- Profiles 1996-97: ABCs Top 25 Schools, North Carolina Department of Public Instruction.
- School Improvement Division's list of variables found in low-performing schools vs. variables found in schools with strong academic performance, North Carolina Department of Public Instruction.

Discuss articles on motivation and high expectations

In small groups of 3-4, discuss articles and homework sheet. Each participant should share his/her most effective strategy for motivating and/or setting high expectations for staff and students. Then each person should share one strategy he/she would like to try.

Discussion, Continued **Completed homework**	At least one person from each table will then share with the whole group either effective strategies used or strategies to try. If the group would like, the homework sheets may be taken up, compiled, and shared among the participants.
Summary	Summarize points covered and accomplishments through the group work, and answer any questions that the participants may have.
Assign homework	For the homework assignment ask participants to provide copies of at least one of the articles to their faculties and plan a time for discussion (perhaps at a faculty meeting).
Reflection/ Evaluation	Ask participants to use their reflection sheets, to revise their action plans as needed, and/or to complete evaluations of the session.

Handouts–

- Reflection Sheet
- Individual Action Plan (from Section I: Activity 1)

Other resources

Carter, Carolyn J., and Klotz, Jack (April 1990). What principals must know before assuming the role of instructional leader. *NASSP Bulletin*, 36-41.

Cash, Jeanie (November/December 1997). What good leaders do. *Thrust for Educational Leadership*, 22-25.

Collopy, Rachel Buck, and Green, Theresa (September 1995). Using motivational theory with at-risk children. *Educational Leadership*, 53(1), 37-40.

Dunn, Kenneth, Ed.D., and Dunn, Rita, Ed.D. (1983). *Situational Leadership for Principals: The School Administrator in Action* . Englewood Cliffs, New Jersey: Prentice-Hall, Inc., Chapter 6–Motivating the Teaching Staff.

Hipp, Kristine A. (May 1997). The impact of principals in sustaining middle school change. *Middle School Journal*, 42-45.

Kanthak, Laurel Martin (November/December 1995). Teamwork: profile of high achieving schools and their leaders. *Schools in the Middle* (NASSP), 27-30.

Katzenmeyer, Marilyn, and Moller, Gayle (1996). *Awakening the Sleeping Giant: Leadership Development for Teachers*. Thousand Oaks, California: Corwin Press, Inc.

Kouzes, James M., and Posner, Barry Z. (1987). *The Leadership Challenge: How to Get Extraordinary Things Done in Organizations*. San Francisco, California: Jossey-Bass Inc., Publishers.

Wheelock, Anne (October 1993). More students learn more with untracking. *Educational Leadership*, 51(2), 82.

Woodcock, Mike, and Francis, Dave (1991). *The Self-Made Leader: 25 Structured Activities for Self Development*. King of Prussia, Pennsylvania: Organization Design and Development, Inc. Activity 20–Developing Others, pages 199-205.

Every Child Can Succeed Video Series–
Part III. Program 4. High Expectations, @ 20 minutes

Other resources, contd.

The Video Journal of Education Series–

Creating Conditions for Success. Featuring Brenda Lyle-Gray.

- Program One–Fostering a Positive School Climate, 36 minutes
- Program Two–Engaging Students in Successful Learning, 36 minutes

Effective Schools: Building Foundations for School Improvement. With Larry Lezotte.

- Program One–Implementing the Correlates of Effective Schools, 36 minutes
- Program Two–Initiating School Improvement, 33 minutes

Encouraging Motivation Among All Students. Presented by Raymond Wlodkowski and Margery Ginsberg.

- Program One–A Model for Intrinsic Motivation, 35 minutes
- Program Two–Culturally Responsive Teaching in the Classroom, 35 minutes

The Quality School: Teaching Quality and Self-Evaluation. With William Glasser.

- Program One–Establishing a Paradigm for Quality, 24 minutes
- Program Two–Self-Evaluation: The Pathway to Real Quality, 25 minutes

Section II: Activity 3
Handout—Strategies for Motivating/ Establishing High Expectations

Directions: Read the article "Motivation Begins With You" and at least three of the other articles on motivation and high expectations. For each, list strategies that were included in the article and indicate with a check mark whether they are ones that you have already tried and found successful, already tried but found unsuccessful, or would like to try. Also record any comments you have. Then at the bottom of the page, describe your most successful strategy for motivating and/or setting high expectations for students and staff.

Strategies	Already Tried, Found Successful	Already Tried, Found Unsuccessful	Would Like to Try	Comments
Article 1: "Motivation Begins With You"				
Article 2:				
Article 3:				
Article 4:				

My most effective strategy for motivating and/or setting high expectations for staff and students:

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Planning for Student Achievement: What the Instructional Leader Can Do

- Motivation and High Expectations
- Curriculum
- Instruction
- Assessment

Section II: Activity 3
Notes–Seven Correlates of Effective Schools

List of Seven Correlates

- Strong instructional leadership
- A clear and focused mission
- A climate of high expectations for success for all students
- A safe, orderly environment
- The opportunity to learn and adequate time spent on academic tasks
- Frequent monitoring of student progress
- Positive home-school relations

(National Center for Effective Schools/Research and Development)

Source of Information

The above correlates were copied from A Guide to the School Improvement Process based on Effective Schools Research, Lawrence Lezotte and Barbara C. Jacoby.

(See Bibliography for complete information necessary to locate this book.)

Additional Information

For additional information on the seven correlates, refer to pages 147 through 153 of the above reference.

Characteristics of Top 25 Schools

- Focus on the North Carolina Standard Course of
- Study
- Strong Instructional Leadership
- High Expectations for All Students
- Focus on the Basics
- Safe and Orderly Climate
- Data-Driven Planning

Section II: Activity 3
Handout—List of Variables
NC Department of Public Instruction, School Improvement Division (11/97)

Variables found in low-performing schools:	Variables found in schools with strong academic performance:
• Very little or no alignment of the instructional program with the NC Standard Course of Study (SCOS) • Lack of knowledge about the SCOS and its support documents • Limited or no instructional monitoring • Limited resources or a mis-alignment of resources to priorities • Loose connection between staff development plans and instructional priorities • Absent or poorly functioning School Improvement Team • Weak instructional leadership by the principal • Low expectations for teacher and student performance • Lack of a consistent school-wide discipline plan • Absence of a systematic method of observing, evaluating, and providing support to staff (certified and classified personnel) • Absent or poor support for Initially Licensed Teachers (ILTs) • High rate of teacher turnover • Difficulty recruiting and retaining certified teachers • Lack of systematic and ongoing assessment of student progress • Limited parental involvement	• Strong instructional leadership • High achievement expectations • Pervasive instructional focus • Teachers know, understand, and teach the SCOS • Clear emphasis on the basics • Many opportunities for staff collaboration • High rate of academic learning time • Consistent monitoring of student progress • Moderate to high parental support • Safe and orderly school climate • School committees/teams focus on priority issues • School Improvement Plan is strong and guides the work of staff • Data-driven planning is utilized • Beginning teachers have strong support • Resources are used to support the instructional priorities of the school • Feedback provided on teacher performance regularly

Special note: All variables in a category may not exist in a single school, but a significant number do.

Section II: Activity 3
Handout–Reflection Sheet

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION II: ACTIVITY 4

TIME	PURPOSE	SETTING	MATERIALS
1 hour 15 minutes	• To formulate definitions of curriculum alignment • To discuss lessons learned/the role of the instructional leader in assuring a sound curriculum • To model curriculum alignment techniques • To discuss component of a good lesson plan • To review lesson plans from participants' schools • To provide lists of resources and have participants check on the availability of those resources at their respective schools	Whole Group Small Group	Lesson plans brought by participants Overhead projector Handout/Transp.—Overview (from Section II: Activity 3) Blank transparencies Transparency marker Chart paper/Markers Masking tape Handout/Transp.—Lessons Learned (1-5) Sample from A Topical Unit on Pets NCSCOS–English Language Arts K-12 Curriculum Alignment Skills Packet Internet resources— • Lesson Plan 1 • Lesson Plan 2 • Design Your Own Lesson Handouts— Checklists of NCDPI and commercial resource materials Needs/Assets Packet Handouts— • Reflection Sheet • Individual Action Plan (from Section I: Activity 1)

Prior assignment

Lesson plans brought by participants

Ask participants to bring in four copies of a lesson plan randomly selected from among their teachers (no names written on them, please).

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Introduce the session

Overhead projector
Handout/Transp.—Overview (from Section II: Activity 3)

Explain that this session is the second session on **Planning for Student Achievement: What the Instructional Leader Can Do**. The trainer may refer to the Handout/Transparency–*Overview*—from Section II: Activity 3. The particular focus of this session is on the **curriculum**; more specifically, what the instructional leader can do to assure a sound curriculum.

Formulate definitions of curriculum alignment

Blank transparencies
Transparency marker

Ask that small groups of 3-4 participants formulate definitions of curriculum alignment. Give each group a blank transparency and transparency marker(s) and ask that they share their definition with the whole group.

Discuss lessons learned

Chart paper
Markers
Masking tape
Handout/Transp.—Lessons Learned (1-5)

Again in small groups, ask participants to discuss the instructional leader's role in assuring a sound curriculum. Ask groups to record their work on chart paper and report to the whole group. Display their work, and compile a single document later to redistribute to the whole group.

Some anticipated responses have been included on Handout/Transparency—*Lessons Learned (1-5)*. However, these are included for information only. It is much better for the groups to develop their lists and have an opportunity for discussion.

Model curriculum alignment techniques

Sample from A Topical Unit on Pets
NCSCOS—English Language Arts K-12

Use any of NCDPI's linking documents from the *Linking Curriculum, Instruction and Testing Series* to demonstrate how to link curriculum, instruction, and testing. As one possibility, a sample from A Topical Unit on Pets: Grades 3-4 Reading (example: "Slower Than the Rest," by Cynthis Rylant, and related materials, pages 12-13, 19-20, and 8-9) may be used, along with relevant sections of the North Carolina Standard Course of Study and Grade Level Competencies English Language Arts (Communication Skills) K-12 (pages 47-51, 79-82).

(See Bibliography for complete information necessary to locate these resources.)

Additional curriculum alignment information/ activities

Curriculum Alignment Skills Packet

Refer to the Curriculum Alignment Skills Packet for additional activities and information.

Discuss lesson plans

Chart paper
Markers
Internet resources—
- Lesson Plan 1
- Lesson Plan 2
- Design Your Own Lesson

Ask the whole group to discuss the components of a good lesson plan. Record components on chart paper. Use the sample lesson plans from the Internet as handouts for information on lesson plans as well as to share the Internet resource with teachers.

Refer to RMC Research Corporation's web site for sample lesson plans:
http://www.rmcdenver.com/useguide/lessons/form.html
http://www.rmcdenver.com/useguide/bank/1.html
http://www.rmcdenver.com/useguide/bank/2.html

Review lesson plans from participants' schools

Lesson plans from participants' schools

Ask participants to get into small groups of 3-4 to review the lesson plans that the participants brought with them. Are lesson plans aligned with the SCOS? Are objectives clear? Are activities varied? Is assessment student-centered?

Explain homework

Handouts—
Checklists of NCDPI and commercial resource materials for reading, writing, and mathematics
Needs/Assets Assessment Skills Packet

Explain the importance of staff having curriculum resource materials available. Provide the participants with both the checklists of NCDPI and commercial resource materials for reading, writing, and mathematics and ask that they complete these before the next session. Refer to the Needs/Assets Assessment Skills Packet for additional resources such as for high schools.

Follow-up activity (perhaps outside of the workshop setting): It is recommended that trainers/NCDPI personnel assemble as many of these resource materials as possible and give participants an opportunity to review them. Participants may also wish to include whole faculty or grade level chairs in the review of the documents. Selection and ordering of needed materials should be a priority. Contact NCDPI for a publications catalog and information about available resources.

Summary

Summarize points covered and accomplishments through the group work, and answer any questions that the participants may have.

Reflection/ Evaluation

Ask participants to use their reflection sheets, to revise their action plans as needed, and/or to complete evaluations of the session.

Handouts–

- Reflection Sheet
- Individual Action Plan (from Section I: Activity 1)

Other resources

Horn, Jerry G. (Winter 1996). Evaluation–a key to successful changes in education? *Catalyst for Change*, 25(2), 5-9.

Sergiovanni, Thomas J. (1987). *The Principalship: A Reflective Practice Perspective*. Newton, Massachusetts: Allyn and Bacon, Inc.

The Video Journal of Education Series–

Developing, Aligning, and Auditing Curriculum. Presented by Fenwick English.

- Program One–Achieving Curriculum Alignment, 40 minutes
- Program Two–Conducting a Curriculum Audit, 41 minutes

Developing Rigorous and Relevant Academic Skills. With Willard R. Daggett. Two videotape programs, approximately 35 minutes each.

Diversity in the Classroom/Multicultural Education. With Carlos Cortes.

- Program One–Education in a Multicultural Society, 34 minutes
- Program Two–Developing Multicultural Curriculum, 35 minutes

Integrating the Curriculum. Presented by Heidi Hayes Jacobs.

- Program One–Meaningful Learning, 27 minutes
- Program Two–Designing Integrated Curriculum, 25 minutes

Planning for Information and Communication Technology. Presented by Alan C. November. 42 minutes.

School-to-Work/Career: Elementary, Middle, and High School. Featuring Richard D. Jones.

- Elementary School-to-Work/Career, 38 minutes
- Middle School-to-Work/Career, 39 minutes
- High School-to-Work/Career, 37 minutes

Technology to Enhance Learning. With Jenelle V. Leonard.

- Program One–Integrating Technology into the Curriculum, 38 minutes
- Program Two–The Power of Technology in the Classroom, 38 minutes

Curriculum-Related Lessons Learned

- Assure that all teachers have a copy of the SCOS.
- Monitor to determine that the SCOS is being taught in every classroom (e.g., not just going through the textbook).
  - ~lesson plans and other planning documents
  - ~informal classroom visits–not just for required evaluation

Section II: Activity 4
Handout/Transparency—Lessons Learned (2)

- Provide in-service on SCOS for new teachers and curriculum updates/review when needed.
- Focus on the link: curriculum, instruction, assessment.
- Assure that staff has needed curriculum/other resource materials (e.g., pacing guides, linking documents, test materials, math and literacy strategies.
- Emphasize a sequential curriculum and encourage communication/planning between grades.

- Teach reading and mathematics in every subject, every class, and give opportunities for writing across the curriculum.
- Practice curriculum integration in other areas as well (e.g., technology integrated throughout).
- Check for program compliance with any local, state, and federal regulations.
- Develop, implement, monitor, evaluate, and modify programs and practices.

- **Make formative evaluation a part of all programs and practices–this should be an integral part of the school improvement process.**
- **Make time for teaching and time for the basics (e.g., scheduling issues).**
- **Have high expectations for mastery of the curriculum and articulate these to students and staff.**
- **Motivate staff and students to reach full potential.**

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- Be visible; sit in on grade level/departmental meetings to assure that the focus is on the adopted curriculum.
- Be knowledgeable of the curriculum and model a strong focus for staff and students (e.g., focus on curriculum issues at faculty meetings, school improvement meetings, etc.).
- Solicit school and community input into the curriculum.

Section II: Activity 4
Handout–A Checklist of NCDPI Resource Materials for Reading, Writing, and Mathematics—K-8

School_____LEA_____

Person Completing
Checklist_____Date_____

Schools that have successful K-8 reading, writing, and math programs have been found to use many of the following resource materials to insure that the written and tested curriculum is taught.

Please review the list in each subject area and identify whether the materials are available to your teachers in their classrooms, are housed in your school's professional library, or are not available in your school. You may want to set up sessions to review any materials that you check as not available in your school.

English/Language Arts Resource Materials Developed by NCDPI	**In each teacher's classroom (as appropriate)**	**In professional library**	**Not available**
English/Language Arts Standard Course of Study K-12 (revised 1997)			
Teacher Handbook, English/Language Arts K-12			
Reference Guide for Integrating Curriculum–Grades K-5			
Linking Curriculum, Instruction and Testing Series			
Grades 3-4, A Topical Unit on Pets			
Grades 5-6, A Topical Unit on Relationships Between Animal and People			
Grades 7-8, A Topical Unit on Time			
Item Bank Testlets			
Reading Testlets, Grade 3			
Reading Testlets, Grade 4			
Reading Testlets, Grade 5			
Reading Testlets, Grade 6			
Reading Testlets, Grade 7			
Reading Testlets, Grade 8			
Teaching Narrative: Write on			
Literature To Be Read Aloud			
Writing in the Real World: The Primary Grades			
Evaluating and Improving Student Writing and Writing Instruction: A Systematic Approach			
Spelling In Use			
Literacy Strategies			
A Five-Year Plan for Reading InService			
The North Carolina Guide to the Early Years for Children Ages 3-7			
Language Arts 1st-2nd Grade Assessment Materials			

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Mathematics Resource Materials Developed by NCDPI	In each teacher's classroom (as appropriate)	In professional library	Not available
Mathematics Standard Course of Study K-12			
Teacher Handbook, Mathematics K-12			
Reference Guide for Integrating Curriculum–Grades K-5			
Linking Curriculum, Instruction and Testing Series			
Grades 3-8, The Data Collection, Display and Interpretation Strand			
Grades 3-8, Patterns, Relationships, Pre-Algebra			
Grades 3-8, The Geometry Strand			
Grades 3-8, The Problem-Solving Strand			
Item Bank Testlets			
Mathematics Testlets, Grade 3			
Mathematics Testlets, Grade 4			
Mathematics Testlets, Grade 5			
Mathematics Testlets, Grade 6			
Mathematics Testlets, Grade 7			
Mathematics Testlets, Grade 8			
Strategies for Instruction in Mathematics and Activities for Instruction and Assessment			
Kindergarten Strategies			
Grade 1 Strategies			
Grade 2 Strategies			
Grade 3 Strategies			
Grade 4 Strategies			
Grade 5 Strategies			
Superstars II, Primary			
Superstars II, Intermediate			
Superstars II, Grade 6			
Resources for Algebra			
Mathematics Matrices			
Grade 1 Observation Matrix			
Grade 2 Observation Matrix			
Grade 3 Observation Matrix			
Grade 4 Observation Matrix			
Grade 5 Observation Matrix			
Grade 6 Observation Matrix			
Grade 7 Observation Matrix			
Grade 8 Observation Matrix			
Geometry Strategies, Grades 6-8			
MathStars, Problem Solving Newsletter			
Mathematics 1st-2nd Grade Assessment Materials			

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Section II: Activity 4
Handout–A Checklist of Commercial Resource Materials for Reading, Writing, and Mathematics–K-8

School_____LEA_____

Person Completing Checklist_____Date_____

Schools that have successful K-8 reading, writing, and math programs have been found to use many of the following resource materials to insure that the written and tested curriculum is taught.

Please review the list in each subject area and identify whether the materials are available to your teachers in their classrooms, are housed in your school's professional library, or are not available in your school. You may want to set up sessions to review any materials that you check as not available in your school.

Commercial English/Language Arts Resource Materials	**In each teacher's classroom (as appropriate)**	**In professional library**	**Not available**
The North Carolina Reading Coach, End-of-Grade Reading Test, Grade 3 (Educational Design, Inc.)			
The North Carolina Reading Coach, End-of-Grade Reading Test, Grade 4 (Educational Design, Inc.)			
The North Carolina Reading Coach, End-of-Grade Reading Test, Grade 5 (Educational Design, Inc.)			
The North Carolina Reading Coach, End-of-Grade Reading Test, Grade 6 (Educational Design, Inc.)			
The North Carolina Reading Coach, End-of-Grade Reading Test, Grade 7 (Educational Design, Inc.)			
The North Carolina Reading Coach, End-of-Grade Reading Test, Grade 8 (Educational Design, Inc.)			
The North Carolina Writing Coach, End-of-Grade Writing Test, Grade 4 (Educational Design, Inc.)			
Blast Off, Grade 3			
Blast Off, Grade 4			
Blast Off, Grade 5			
Blast Off, Grade 6			
Blast Off, Grade 7			
Blast Off, Grade 8			
Alternatives to Worksheets (Creative Teaching Press)			
Read-Write-Publish (Creative Teaching Press)			
Wright Group Story Box Sets, Grades K-2 (Wright Group)			
Others			

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Commercial Mathematics Resource Materials	In each teacher's classroom (as appropriate)	In professional library	Not available
The North Carolina Mathematics Coach, End-of-Grade Mathematics Test, Grade 3 (Educational Design, Inc.)			
The North Carolina Mathematics Coach, End-of-Grade Mathematics Test, Grade 4 (Educational Design, Inc.)			
Blast Off, Grade 3			
Blast Off, Grade 4			
Blast Off, Grade 5			
Blast Off, Grade 6			
Blast Off, Grade 7			
Blast Off, Grade 8			
Others			

Section II: Activity 4
Handout–Reflection Sheet

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. **What was the most useful part of this session?**

•

2. **What did you learn from this session?**

•

3. **How will this help you in your position?**

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session. I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION II: ACTIVITY 5

TIME	PURPOSE	SETTING	MATERIALS
1.5 hours	• Discuss qualities of best teachers • Discuss teacher-centered vs. student-centered classrooms • Discuss characteristics of/ strategies for excellent teaching based on video modeling excellent teaching • Discuss best practices in reading, writing, and mathematics (and possibly science and social studies) • Review/discuss the instructional leader's role in quality instruction	Whole Group Pairs Small Group	Article—What to Look for in a Classroom Best Practice ... book Overhead projector Handout/Transp.—Overview (from Section II: Activity 3) Handout—Teacher-Centered vs. Student-Centered Classrooms Chart paper Markers Masking tape Video—The Eddie Files Classroom Management Skills Packet Evaluation of Personnel Skills Packet Handout/Transp.—Lessons Learned (1-5) Handouts—Reflection Sheet Individual Action Plan (from Section I: Activity 1)

Prior reading

Article—What to Look for in a Classroom

Best Practice: New Standards for Teaching and Learning in America's Schools

Ask that participants read the Article—*What to Look for in a Classroom*—prior to the session. In addition, participants should have been assigned (or selected) a portion of the book Best Practice: New Standards for Teaching and Learning in America's Schools to read prior to the session. At a minimum, the sections of the book on best practices in reading, writing, and mathematics should be read (three groups of 3-4 people each). Social studies and science could also be added as group assignments.

- *What to Look for in a Classroom*, Alfie Kohn.
- Best Practice: New Standards for Teaching and Learning in America's Schools, Steven Zemelman, Harvey Daniels, and Arthur Hyde.

(See Bibliography for complete information necessary to locate resources.)

Introduce the Session

Overhead projector
Handout/Transp.—Overview (from Section II: Activity 3)

Explain that this session is the third session on **Planning for Student Achievement: What the Instructional Leader Can Do**. The trainer may refer to the Handout/Transparency—*Overview*—from Section II: Activity 3. The particular focus of this session is on **instruction** and what the instructional leader can do to assure effective instruction.

Share best teacher recollections

Ask participants to think and share recollections of best teachers (from student perspective) with a partner. What were the qualities? Afterwards, volunteers can share briefly with the whole group.

Discuss student-centered vs. teacher-centered classrooms

Handout–Teacher-Centered vs. Student-Centered Classrooms
Chart paper
Markers
Masking tape
Article from prior reading

Using a T-chart drawn on chart paper (see Handout—*Teacher-Centered vs. Student-Centered Classrooms*), ask participants to detail characteristics of a student-centered classroom vs. a teacher-centered classroom. The Article—*What to Look for in a Classroom*—can be used for discussion.

Article—

- *What to Look for in a Classroom*, Alfie Kohn.

Show video modeling excellent teaching/ discuss characteristics of/ strategies for excellent teaching

Video—from The Eddie Files

Show one of the Kay Toliver tapes in The Eddie Files series; these model excellent math teaching. Ask participants to discuss the characteristics/ strategies which they observed.

Video: The Eddie Files (1995-1997)–Any one of the tapes can be selected; each segment is 18-22 minutes.

(The Bibliography contains a complete reference for these videos; however, copies may be recorded off a PBS station or, if necessary, borrowed from the North Carolina Department of Public Instruction. Contact the North Carolina Department of Public Instruction, Educational Technologies, Emerging Technologies Section, for further details.)

Discuss best practices and present to the whole group

Best Practice book
Chart paper/ other materials for presentations

Ask participants to get into small groups based on the section of the **Best Practice** book read prior to the session. Each group should discuss its part of the book (reading, writing, mathematics, perhaps science and social studies) and present relevant portions to the whole group. Participants should have an opportunity to ask questions of each other.

- Best Practice: New Standards for Teaching and Learning in America's Schools, Steven Zemelman, Harvey Daniels, and Arthur Hyde.

Additional instructional activities/ materials

Classroom Management Skills Packet
Evaluation of Personnel Skills Packet

Refer to the Classroom Management Skills Packet for specific activities and information regarding classroom management. Likewise, the Evaluation of Personnel Skills Packet contains additional information and activities on evaluating instructional personnel and others.

Discuss the instructional leader's role in assuring quality instruction

Chart paper
Markers
Masking tape
Handout/ Transparency—Lessons Learned (1-5)

Ask the whole group to discuss the instructional leader's role in assuring quality instruction. What are some things the instructional leader can do? Record these on chart paper.

Some anticipated responses have been included on Handout/ Transparency—*Lessons Learned (1-5)*. However, these are included for information only. It is much better for the groups to develop their lists and have an opportunity for discussion.

Summary

Summarize points covered and accomplishments through the group work, and answer any questions that the participants may have.

Reflection/ Evaluation

Ask participants to use their reflection sheets, to revise their action plans as needed, and/or to complete evaluations of the session.

Handouts–

- Reflection Sheet
- Individual Action Plan (from Section I: Activity 1)

Other resources

Armstrong, Thomas (November 1994). Multiple intelligences: seven ways to approach curriculum. *Educational Leadership*, 52(3), 26-28

Bartz, David E., and Bartz, Richard H. (March 1995). Improving the summative evaluation conference. *Principal*, 74(4), 24-26.

Brodhagen, Barbara L. (January 1998). Varied teaching and learning approaches. *Middle School Journal*, 29(3), 49-52.

Calhoun, Emily F. (October 1993). Action research: three approaches. *Educational Leadership*, 51(2), 62-65.

Campbell, Linda (September 1997). How teachers interpret MI theory. *Educational Leadership*, 55(1), 14-19.

Carter, Carolyn J. (March 1997). Why reciprocal teaching? *Educational Leadership*, 64-68.

Checkley, Kathy, and Gardner, Howard (September 1997). The first seven . . . and the eighth: a conversation with Howard Gardner. *Educational Leadership*, 55(1), 8-13.

Henderson-Sparks, Joan, Ehrgott, Richard H., and Sparks, Jr., Richard K. (March 1995). Managing your marginal teachers. *Principal*, 74(4), 32-35.

McCarthy, Bernice (March 1997). A tale of four learners: 4MAT's learning styles. *Educational Leadership*, 46-51.

Murphy, Carlene (November 1992). Study groups foster schoolwide learning. *Educational Leadership*, 50(3), 71-74.

Newmann, Fred M., and Wehlage, Gary G. (April 1993). Five standards of authentic instruction. *Educational Leadership* , 50(7), 8-12.

Ogden, Lily (May/June 1998). A better way to supervise. *Thrust for Educational Leadership*, 20-21.

Phelps, Patricia H. (April 1990). Rx for instructional supervision: look to the physician. *NASSP Bulletin*, 12-14.

Sullivan, Richard L., and Wircenski, Jerry L. (October 1988). Clinical supervision: the role of the principal. *NASSP Bulletin*, 34-39.

Other resources, contd.

Tomlinson, Carol Ann, Moon, Tonya, and Callahan, Carolyn M. (January 1998). How well are we addressing academic diversity in the middle school? *Middle School Journal*, 29(3), 3-11.

Tredway, Lynda (September 1995). Socratic seminars: engaging students in intellectual discourse. *Educational Leadership*, 53(1), 26-29.

Every Child Can Succeed Video Series–

Part III. Program 1. Staff Development, @ 20 minutes
Part III. Program 8. Effective Instructional Strategies, @ 20 minutes
Part III. Program 9. Learning Essential Skills, @ 20 minutes

The Video Journal of Education Series–

Achieving Reading Success in the Early Years. Presented by Margaret Mooney. Two videotape programs, approximately 35 minutes each. Available Spring 1998.

Brain Compatible Learning. Presented by Susan Kovalik.

- Program One–A Model for a Brain Compatible Classroom, 34 minutes
- Program Two–The ITI Model at Work, 33 minutes

Bringing Brain Research into Classroom Practice. Featuring Pat Wolfe.

- Program One: How the Brain Works While Learning, 33 minutes
- Program Two–Bringing Learning into Long-Term Memory, 32 minutes
- Program Three–An Enriched Environment for Learning, 44 minutes

The Collaborative Workplace and Peer Coaching. With Pam Robbins.

- Program One–Collaboration: Breaking the Isolation, 34 minutes
- Program Two–Peer Coaching, 32 minutes

Cooperative Learning and Multiple Intelligences. With Spencer and Laurie Kagan.

- Cooperative Learning and Multiple Intelligences, Elementary, @ 35 minutes
- Cooperative Learning and Multiple Intelligences, Middle School, @ 35 minutes
- Cooperative Learning and Multiple Intelligences, High School, @ 35 minutes

Effective Teacher Teaming: Secondary and Elementary. Presented by successful teacher teams.

- Program One–The Many Structures of Teaming, 27 minutes
- Program Two–Teams in Action, 27 minutes

Other resources, contd.

The Video Journal of Education Series–(continued)

Focus on Thinking. Featuring Faye Brownlie.

- Program One–Creating Thoughtful Learners, 25 minutes
- Program Two–More Strategies for Thinking, 27 minutes

A Fresh Look at Cooperative Learning. Presented by Patricia Roy.

- Program One–Targeting Real Cooperative Learning, 28 minutes
- Program Two–Making It Work, 29 minutes

Helping Disruptive and Unresponsive Students. Featuring Diane Chelsom Gossen.

- Program One–Foundations for Developing Self-Control, 23 minutes
- Program Two–The Tools of Reality Therapy, 27 minutes

The Heterogeneous Classroom. With Marian Leibowitz.

- Program One–Preparing Students for a Changing World, 39 minutes
- Program Two–Managing Heterogeneity for Greater Achievement, 40 minutes

Inclusion. Featuring Marsha Forest and Jack Pearpoint.

- Program One–Building Inclusive Communities, 33 minutes
- Program Two–Moving Students from Isolation to Interaction, 33 minutes

Increasing Student Performance and Achievement. With Max Thompson and Julia Thomason.

- Increasing Elementary Performance and Achievement, @ 3 minutes
- Increasing Middle School Performance and Achievement, @ 35 minutes
- Increasing High School Performance and Achievement, @ 35 minutes

Instructional Strategies for Greater Student Achievement. Presented by Robert Hanson, Harvey Silver, and Richard Strong.

- Program One–Shifting to More Powerful Teaching, 27 minutes
- Program Two–Applying Instructional Strategies, 36 minutes

Strategies for Elementary, Middle, and High Schools. Companion to *Instructional Strategies for Greater Student Achievement*.

- Strategies for Elementary School Teachers, 59 minutes
- Strategies for Middle School Teachers, 55 minutes
- Strategies for High School Teachers, 60 minutes

Integrating Teaching Models for Elementary and Secondary School Teachers. Presented by Barrie Bennett.

- Integrating Teaching Models for Elementary Teachers, 46 minutes
- Integrating Teaching Models for Secondary Teachers, 53 minutes

Other resources, contd.

The Video Journal of Education Series– (continued)

Learning Differences: Designing Instruction with The 4MAT System. Featuring Bernice McCarthy.

- Program One–Understanding 4MAT, 25 minutes
- Program Two–Utilizing 4MAT, 30 minutes

Mastery Learning in the Instructional Process. Featuring James Block and Steve Olsen.

- Program One–Instruction for Mastery, 25 minutes
- Program Two–The Instructional Process in Action, 25 minutes

Multiple Intelligences. Featuring Howard Gardner with David Lazear.

- Program One–Discovering the Seven Intelligences, 31 minutes
- Program Two–Enriching Students' Intelligences in the Classroom, 38 minutes

Positive Discipline in the Classroom. Featuring Jane Nelsen.

- Program One–A Foundation for Positive Discipline, 35 minutes
- Program Two–Class Meeting: A Forum for Positive Discipline, 51 minutes

Results-Driven Staff Development. Presented by Dennis Sparks and Stephanie Hirsh.

- Program One–A Paradigm Shift: Staff Development for Improved Learning, 35 minutes
- Program Two–National Staff Development Council Standards for Staff Development (two-part program)
  - @ Part One–The Context and Content Standards, 37 minutes
  - @ Part Two–The Process Standards, 40 minutes

Student-Centered Reading and Learning Strategies. Presented by Carol Santa.

- Reading and Learning Strategies for Elementary Schools, two videotape programs, 37 and 40 minutes
- Reading and Learning Strategies for Middle Schools, two videotape programs, 47 and 40 minutes
- Reading and Learning Strategies for High Schools, two videotape programs, 49 and 37 minutes

Teacher Induction, Mentoring, and Renewal. Presented by Harry K. Wong.

- Program One–New Teacher Preparedness through Effective Induction, 35 minutes
- Program Two–Mentoring and Teacher Renewal, 30 minutes

Other resources, contd.

The Video Journal of Education Series– (continued)

Teaching in the Block: Engaging Students in Active Learning (for secondary teachers). Featuring Phyllis Hotchkiss and skilled secondary teachers.

- Program One–Making Use of Expanded Time, 34 minutes
- Program Two–English and Social Studies in the Block, 41 minutes
- Program Three–Math and Science in the Block, 44 minutes

Teaching Intelligent Behaviors for Thinking and Problem Solving. With Art Costa.

- Program One–The Behaviors of Intelligence, 53 minutes
- Program Two–Teaching Toward the Intelligent Behaviors, 47 minutes

The Technology-Infused Classroom. Presented by Nancy Sulla.

- The Technology-Infused Elementary Classroom, @ 35 minutes
- The Technology-Infused Middle School Classroom, @ 35 minutes
- The Technology-Infused High School Classroom, @ 35 minutes

Utilizing the Internet in the Classroom. Featuring Jamieson McKenzie. 38 minutes.

Section II: Activity 5
Handout–Teacher-Centered Vs. Student-Centered Classrooms

Teacher-Centered Classroom	Student-Centered Classroom

Section II: Activity 5
Handout/Transparency–Lessons Learned (1)

Instruction-Related Lessons Learned

. Encourage and model continuous learning.
~discussions of best practices among staff both informally and formally
~ongoing, relevant staff development (aligned with the School Improvement Plan) for self and faculty to enhance knowledge and skills

~opportunities for teachers to observe one another and provide feedback (both at the home school and other schools)
~ interest in what the staff is learning (e.g., attendance at their staff development sessions)
~continuous research and application of what is learned

Section II: Activity 5
Handout/Transparency–Lessons Learned (3)

- Hold high expectations for self and staff.
  - ~emphasis on teaching and learning
  - ~belief that all children can learn and that the school will do everything it can to assure that this happens
- Emphasize student-centered rather than teacher-centered classrooms (e.g., students actively engaged in their own learning).

Monitor frequently (high time on task; classroom management; sound instructional practices, etc.).

Section II: Activity 5
Handout/Transparency–Lessons Learned (4)

- Observe teachers and provide feedback often.
- Empower teachers to make decisions, take risks.
- Focus on the link: curriculum, instruction, assessment (Are teachers teaching the SCOS, and are they using assessments to make instructional decisions–what has been mastered/what needs to be reviewed/retaught?).
- Develop and implement a strong support system for new teachers.

- **Make formative evaluation a part of all programs and practices–this should be an integral part of the school improvement process.**
- **Schedule instructional time to maximize learning (e.g., uninterrupted blocks of time for reading).**
- **Expand the support for student learning (e.g., after-school tutoring programs, parent/ community involvement, support from central office/board of education.**

Section II: Activity 5
Handout–Reflection Sheet

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. **What was the most useful part of this session?**

•

2. **What did you learn from this session?**

•

3. **How will this help you in your position?**

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION II: ACTIVITY 6

TIME	PURPOSE	SETTING	MATERIALS
1.5 hours	• Discuss state testing, data analysis and application • Provide information on developing assessment literacy • Determine what can be measured with various types of assessment • Discuss a variety of student-centered assessments • Discuss the instructional leader's role in student assessment • Complete self-assessment to determine if improvement has been made	Whole Group Individual Small Group	Handout—Knowing What Counts excerpt Test results from state testing program Overhead projector Handout/Transparency —Overview (from Section II: Activity 3) Data Analysis & Application Skills Packet Handout—Developing Assessment Literacy Handout/Transparency —Developing Assessment Literacy 1-5 Handout/Transparency —Aligning Achievement ... Chart paper/markers Masking tape Handout/Transp.— Lessons Learned 1-3 Handout—Standards for Principal and Assistant Principal Evaluation (from Section I: Activity 1) Handouts— • Reflection Sheet • Individual Action Plan (from Section I: Activity 1) • Evaluation Form

Prior reading

Handout—Knowing What Counts excerpt
Test results from state testing program

Ask participants to have read the short excerpt from Gregory, Cameron, and Davies' Knowing What Counts—"Why involve students in assessment? What is in it for the learning?"—prior to the session. Likewise, ask that they gather and bring with them reports containing their results from state end-of-grade or end-of-course testing.

BEST COPY AVAILABLE

Introduce the session

Overhead projector
Handout/Transp.—Overview (from Section II: Activity 3)

Explain that this session is the fourth session on **Planning for Student Achievement: What the Instructional Leader Can Do**. The trainer may refer to the Handout/Transparency—*Overview*—from Section II: Activity 3. The particular focus of this session is on **assessment** and what the instructional leader can do to assure sound assessment.

Discuss state testing and data analysis and application

Data Analysis & Application Skills Packet
Test results from state testing program

Use materials from the Data Analysis & Application Skills Packet to discuss state testing and data analysis and application. Participants should learn and/or have an opportunity to discuss the state testing and ABCs Tools–what information these provide and what they do not provide. Hands-on activities and actual data analysis by participants are recommended. They may use their own test data for the discussion. Also, this will help to determine if they have all available information.

Provide information on developing assessment literacy

Handout—Developing Assessment Literacy
Handout/Transp.—Developing Assessment Literacy 1-5

Use the Handout—*Developing Assessment Literacy*—from Rick Stiggins' Leadership for Excellence in Assessment to discuss assessment literacy. Handouts/Transparencies—*Developing Assessment Literacy (1-5)*—may also be used to discuss standards of assessment quality, barriers, and suggested program objectives for teachers and administrators.

Complete exercise/ discuss what can be measured with various types of assessment

Handout/Transp.—Aligning Achievement ...

Explain/discuss assessment methods and targets. As an exercise related to Stiggins' third standard ("Quality assessments accurately reflect the intended target and serve the intended purpose."), ask individuals and then small groups to complete the Handout/ Transparency—*Aligning Achievement Targets to Assessment Methods*—and discuss what can be measured with various types of assessment. They should determine which assessment method(s) can be used to assess various achievement targets (knowledge, reasoning, skills, products). End with whole-group discussion of this activity.

Discuss a variety of student-centered assessments

Handout—Knowing What Counts excerpt
Chart paper
Markers

Discuss the Handout—Knowing What Counts—excerpt which participants read prior to the session—*"Why involve students in assessment? What is in it for the learning?"* Afterwards, ask participants to list various types of assessments and explain **how** these are/can be student-centered. Record this whole-group work on chart paper.

Discuss the instructional leader's role in student assessment

Chart paper
Markers
Masking tape
Handout/Transp.—
Lessons Learned 1-3

Ask small groups of 3-4 to discuss the instructional leader's role in student assessment. What are some things the instructional leader can do? Small groups will then report to the whole group, and a single list will be compiled.

Some anticipated responses have been included on Handout/ Transparencies—*Lessons Learned (1-3)*. However, these are included for information only. It is much better for the groups to develop their lists and have an opportunity for discussion.

Summary

Summarize points covered and accomplishments through the group work, and answer any questions that the participants may have.

Homework assignment: re-evaluate using the self-assessment

Handout—Standards for Principal and Assistant Principal Evaluation (from Section I: Activity 1)

For homework, ask participants to use the Handout—*Standards for Principal and Assistant Principal Evaluation*— instrument from Section I: Activity 1 to self-assess and determine if improvement has been made since the beginning of the Leadership Development training.

Reflection/ Evaluation

Handouts—

- Reflection Sheet
- Individual Action Plan (from Section I: Activity 1)

Ask participants to use their reflection sheets, to revise their action plans as needed, and/or to complete evaluations of the session.

Other resources

Glasman, Naftaly S. (1986). *Evaluation-Based Leadership: School Administration in Contemporary Perspective*. Albany, New York: State University of New York Press.

Khattri, Nidhi, Kane, Michael B., and Reeve, Alison L. (November 1995). How performance assessments affect teaching and learning. *Educational Leadership*, 53(3), 80-83.

Stiggins, Richard J. (1997). *Student-Centered Classroom Assessment*. Second Edition. Upper Saddle River, New Jersey: Prentice-Hall, Inc.

Wasserstein, Paulette (September 1995). What middle schoolers say about their schoolwork. *Educational Leadership*, 53(1), 41-43.

Every Child Can Succeed Video Series–
Part III. Program 7. Monitoring School Progress. @ 20 minutes

The Video Journal of Education Series–
Assessment for Quality Learning. Presented by Rick Stiggins.

- Program One–Exploring Assessment Alternatives, 26 minutes
- Program Two–Performance Assessments, 27 minutes

Performance Assessment in the Classroom. With Jay McTighe.

- Program One–Performance Based Assessment and Instruction, 29 minutes
- Program Two–Creating Performance Tasks, 31 minutes

Portfolio Assessment. Featuring Bena Kallick.

- Program One–Reflections of Learning, 29 minutes
- Program Two–Utilizing Portfolios, 29 minutes

SECTION II: Activity 6
Handout—Knowing What Counts

Why involve students in assessment? What is in it for the learning?

To find examples and discussion of involving students in their own assessment look to the literature that focuses on reflection, metacognition, self regulation, feedback and learning. Research and informed opinions in these areas converge on the idea that involving students in their own assessment is important for learners and learning. Highlights of findings include:

- When students are involved in their own assessment, they understand their learning and can learn more (Elbow, 1986; Wiggins, 1993; Stiggins, 1996).
- When students are involved in their own assessment, their self assessments help teachers design instruction to better meet the needs of learners (Anthony, Johnson, Mickelson & Preece, 1991; Davies, Politano, Cameron & Gregory, 1992); Elbow, 1986; Preece, 1995; Wiggins, 1993).
- When students are involved in their own assessment they talk about what needs to be learned as they look to criteria (what counts) in order to understand what needs to be done/learned. Talking about what needs to be learned and what it might look like helps people learn more because learning is socially mediated (Berger & Luckman, 1966; Bruner, 1978, 1984; Feuerstein, 1990; Luria, 1981; Preece, 1993; Smith, 1986, 1995; Vygotsky, 1962, 1978; Walters, Seidel, & Gardner, 1994).
- When students are involved in their own assessment, they are required to think about their learning and articulate their understandings which helps them learn (Burns, 1995; Newman, 1994; Schon, 1983, 1990; Schwartz, 1991; Walters, Seidel, & Gardner, 1994; Wolf, 1987, 1988, 1992; Zessoules & Gardner, 1991).
- Self assessment requires students to ask themselves questions. Similar to an 'expert,' students use questions to guide their thinking. (Schon, 1983; Walters, Seidel, & Gardner, 1994). Self assessment requires students to answer basic questions about how they are doing and how they can do better (Kilborn, 1990; Davies, Politano, Cameron, & Gregory, 1992).
- When students are involved in their own assessment what needs to be learned is part of the classroom conversation and influences their learning. Also, what has been learned is more visible as students record their thinking about their learning—as students self-assess and set goals (Davies, Politano, Cameron, & Gregory, 1992; MacDonald, 1982; Restak, 1988; Wasserman & Ivany, 1988).
- Self assessment asks students to make choices about what to focus on next in their learning. When students make choices about their learning, achievement increases; when choice is absent, learning decreases (Purkey & Novak, 1984; deCharms, 1968; Lepper & Green, 1975; Maehr, 1974; Mahoney, 1974; Tjosvold, 1977; Tjosvold & Santamaria, 1977; Deci & Ryan, 1985; Mager & McCann, 1963).

© Gregory, K. Cameron, C. Davies, A. - excerpt from series *Knowing What Counts* (in press) as well as research basis for Involving Students in Assessment and Reporting (In Progress). Permission granted to copy with source identified. For further information contact Classroom Connections 1-800-603-9888 (February, 1998).

- When students are involved in their own assessment they consider their own strengths and the areas they need to improve. By doing so they have the opportunity to make the most of strengths and correct or compensate for their weaknesses. This leads to greater success as learners and as people (Davies, Politano, Cameron, & Gregory, 1992; deCharms, 1968, 1972; Pressley, 1987; Sternberg, 1996).
- When students are involved in their own assessment they know what needs to be learned, what constitutes proof or evidence, and are able to give themselves feedback about their learning. Self assessment is feedback which is essential for learning (Caine & Caine, 1991, 1997; Carr and Kemmis, 1986; Dewey, 1964; Elbow, 1986; Lewin, 1952, 1946; Senge, 1990; Stiggins, 1996; Sylwester, 1995; Wiggins, 1993).
- When students are involved in their own assessment, mistakes become information or feedback to use to adjust what they are doing. When students pay attention to mistakes in their learning and identify ways to improve, they learn. When students' mistakes are identified by others and feedback limited to marks or letters, students are less likely to know what to do differently next time. Limiting specific feedback limits learning. Students with poor marks are more likely to see themselves as failures. Students who see themselves as failures less likely succeed as learners (Kamii, 1984; Kohn, 1995; Seagoe, 1970; Shepard & Smith, 1986, 1987; Phillips, 1995).

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SECTION II: Activity 6
Handout—Developing Assessment Literacy*

If decision makers are to fulfill the various roles spelled out previously, they must have access to dependable information about student achievement. Quality assessments are a must. We can develop and use high quality assessments only if we formulate and apply rigorous standards of quality. To apply those standards consistently, within known contexts, teachers and administrators must have the opportunity to learn about and practice using them: In short, they must become assessment literate.

A set of assessment quality control standards is outlined below, along with several roadblocks to their implementation and specific strategies for removing those obstacles.

Standards of Assessment Quality

We can frame the key attributes of sound assessments in the form of five standards. These are the criteria by which we must judge the quality of our classroom and standardized assessments.

Standard 1. Quality assessments arise from and accurately reflect clearly specified and appropriate achievement expectations for students.

Knowing precisely what we are asking students to master is important because different targets require the application of different assessment methods. In any assessment context, we must begin the assessment development process by defining a clear vision of what it means to succeed. Do we expect our students to:

- Master subject matter content, meaning to *know and understand*?

  Does this mean they must know it outright?
  Or does it mean they must know where and how to find it, using references?

- Use knowledge to *reason* and solve problems?

- Demonstrate mastery of specific *performance* skills, where it's the doing that is important, or

- Use their knowledge, reasoning and skills to create *products* that meet standards of quality?

Because there is no single assessment method capable of assessing all these various forms of achievement, one cannot select a proper method without a sharp focus on which of these expectations is to be assessed.

*An excerpt from Leadership for Excellence in Assessment—A School District Planning Guide by Richard Stiggins, Assessment Training Institute.

Standard 2. Sound assessments are specifically designed to serve instructional purposes.

We cannot design assessments without asking who will use the results and how. Recall that Figure 2 lists the important users of assessments in schools, each of whom needs different information at different times to answer different questions. To provide quality information for teacher, student and parent at the classroom level, we need sound classroom assessments. To provide useful information at the levels of policy or instructional support, we need quality standardized tests. Because of the differences in information needs, we must begin each assessment event with a clear sense of whose needs we are meeting. Otherwise our assessments are without purpose.

Standard 3. Quality assessments accurately reflect the intended target and serve the intended purpose.

Since we have several different kinds of achievement to assess, and since no single assessment method can reflect them all, we must rely on a variety of methods. The options include selected response (multiple choice, true/false, matching and fill in), essays, performance assessments (based on observation and judgment), and direct personal communication with the student. Our assessment challenge is to match a method with an intended target, as depicted in Figure 3 (next page). Our professional development challenge is to be sure all concerned with quality assessment know and understand how the various pieces of this puzzle fit together.

Standard 4. Quality assessments provide a representative sample of student performance that is sufficient in its scope to permit confident conclusions about student achievement.

All assessments rely on a relatively small number of exercises to permit the user to draw inferences about a student's mastery of larger domains of achievement. A sound assessment offers a representative sample of all those possibilities that is large enough to yield dependable inferences about how the respondent would have done if given all possible exercises. Each assessment context places its own special constraints on our sampling procedures. Our quality control challenge is to know how to adjust the sampling strategies to produce results of maximum quality at minimum cost in time and effort.

Standard 5. Sound assessments are designed, developed and used in such a manner as to eliminate sources of bias or distortion that interfere with the accuracy of results.

Even if we devise clear achievement targets, transform them into proper assessment methods, and sample student performance appropriately, there are still factors that can cause a student's score on a test to misrepresent his or her real achievement. Problems can arise from the test, the student or the environment where the test is administered.

For example, tests can consist of poorly worded questions, place reading or writing demands on respondents that are confounded with mastery of the material being tested, have more than one correct response, be incorrectly scored, or contain racial or ethnic bias. The student can experience extreme evaluation anxiety or interpret test items differently from the author's intent, as well as cheat, guess or lack motivation. Any of these could give rise to inaccurate test results. Or the assessment environment could be uncomfortable, poorly lighted, noisy or otherwise distracting.

Part of the challenge of becoming assessment literate is to be aware of the potential sources of bias and to know how to devise assessments, prepare students, and plan assessment environments to deflect these problems before they ever impact results.

Figure 3
Aligning Achievement Targets to Assessment Methods

Target to Be Assessed	Assessment Method			
	Selected Response	Essay	Performance Assessment	Personal Communication
Knowledge Mastery	Multiple Choice, true/ false, matching, and fill-in can sample mastery of elements of knowledge	Essay exercises can tap understanding of relationships among elements of knowledge	Not a good choice for this target—Three other options preferred	Can ask questions, evaluate answers and infer mastery—but a time-consuming option
Reasoning Proficiency	Can assess understanding of basic patterns of reasoning	Written descriptions of complex problem solutions can provide a window into reasoning proficiency	Can watch students solve some problems and infer about reasoning proficiency	Can ask student to "think aloud" or can ask follow-up questions to probe reasoning
Skills	Can assess mastery of prerequisites of skillful performance—but cannot tap the skill itself	Can assess mastery of the prerequisites of skillful performance—but cannot tap the skill itself	Can observe and evaluate skills as they are being performed	Strong match when skill is oral communication proficiency; also can assess mastery of knowledge prerequisite to skillful performance
Ability to Create Products	Can assess mastery of knowledge prerequisite to the ability to create quality products—but cannot assess the quality of products themselves	Can assess mastery of knowledge prerequisite to the ability to create quality products—but cannot assess the quality of products themselves	A strong match can assess: (a) proficiency in carrying out steps in product development, and (b) attributes of the product itself	Can probe procedural knowledge and knowledge of attributes of quality products—but not product quality

From Stiggins, Richard J., *Student-Centered Classroom Assessment, 2nd Ed.* (Columbus, Ohio: Merrill, 1996).

Barriers to Quality

Even though the five quality standards discussed previously are straightforward and relatively easy to understand, they can be very difficult to meet. As it turns out, we face an imposing array of personal, community, and institutional barriers to quality assessment. Let's explore four such roadblocks, along with a strategy for their removal.

A Personal Barrier to Quality Assessment

In this guide, we ask educators to be clear about targets, assess them well and be public about results. But what if teachers administer rigorous assessments and the results reveal that students did not hit the target? And what if that failure was due to factors beyond the teacher's control—for example students who failed to fulfill their responsibilities? If this happens, teachers or administrators may be unjustly blamed for students' lack of learning.

Under these circumstances, it may seem safer to remain vague about achievement expectations and to couch assessment results in such technically complex test scores and complicated grade book manipulations that no one could ever determine how much learning really took place in classrooms or schools. Such procedures appear to address accountability for student learning without risking real accountability.

But the question we must ask is this: If we preserve our own safety in these ways, what are the implications of our behavior for student learning? Clearly, the implications will be far from positive. In this way, our sense of vulnerability about being evaluated can lead us to distinctly unsound practices. But how do we overcome this pervasive fear? By becoming assessment literate. More about that below.

Institutional Barriers to Quality

Without doubt, the most prominent barrier to quality assessment from the teacher's point of view is the lack of time to assess well. If teachers feel they don't have time to meet the standards of assessment quality, they won't. Several specific issues trouble teachers deeply.

One concern is the broadening curriculum, which means teachers must assess an ever expanding array of student achievement goals. The curriculum is growing to include more achievement targets such as important technology and health-related topics, more complexity with the "established" targets (for instance, an enhanced understanding of what it means to be a proficient reader or writer), and more complex ways of integrating the curriculum across disciplines. How can teachers assess even more when they already have too little time to assess current targets?

There is only one answer: Learn to assess smarter, not harder. One way to narrow the curriculum and therefore focus on assessments more sharply is to differentiate between (a) core content knowledge students must know outright to function within a discipline, and (b) content which we can teach them to retrieve when they need it through the use of reference materials. If we assess mastery of the core and the students' skill in retrieving the rest, we focus the assessment challenge.

A second solution is to start with a vision of twelfth-grade achievement and trace that vision back down through the K-12 curriculum so as to develop a smooth and complete transition from beginning student to competent student. In this way, we can remove redundant and irrelevant material and promote efficient instruction and assessment. Both of these strategies make the teacher's assessment job easier to define and complete.

Here is another time problem: Many teachers contend that the currently popular assessment methods are too labor intensive. The message administrators and teachers are receiving is that performance assessment methodology—authentic exercises leading to

observations and judgments of students—is the only acceptable way to assess student achievement. Advocates cite the richness of results they can derive from detailed observations of performance and judgment based on complex performance standards. Hidden between the lines for many teachers is the subliminal message "lots of hard work!" Some respond by digging in their heels. Few educators are actively looking for more work to do.

Again, the solution is to learn to assess smarter, not harder. An obsession with performance assessment can throw the picture out of balance. Performance assessment is not always the best way. In fact, sometimes it isn't even an acceptable way to assess. In certain instances, and with certain achievement targets, other methods such as multiple choice or true/false tests are better choices. When they fit, these are always more efficient options. And even when we *do* turn to performance assessment, only those with a rich knowledge of the method know how to use it efficiently. Consequently, to tap assessment options with maximum efficiency, we must be assessment literate.

A third time problem is that for many districts the only acceptable way to store and communicate information about student achievement, according to the district policy manual, is the grade book and report card grades. That process eats huge amounts of time all by itself, leaving neither time nor opportunity to consider alternatives.

If we conceive of record keeping as a teacher-centered activity relying on turn-of-the-century grade book technology, the time demands far outstrip anything a teacher or administrator can manage. Again, the solution to this problem lies in breaking an outdated mold. Information-processing technology of the 1920s will not—indeed cannot—meet the emerging needs of the 90s. We must start with a sharply focused vision of achievement targets, thoroughly developed assessment plans, highly efficient assessment methods, and strategies for record keeping that rely on many helpers and modern information management technology. But to tap this technology, we need access to it and sufficient assessment literacy to take advantage of it.

A Community Barrier to Quality

It is not uncommon for parents to define sound assessment practices in terms of their own personal experience when they were in school The standard they set is this: Anything you do to my child by way of assessment that I didn't do in school is unsound practice. If the practices they experienced were sound and appropriate, parents are right to hold us accountable for them. But the problem arises when the practices they demand are, in fact, unsound. Then this resistance becomes a barrier to quality.

The only way past this roadblock is for educators to be sufficiently assessment literate to be able to describe their assessment practices in non-defensive and convincing terms to those who question them.

The Ultimate Barrier to Quality

We cannot meet standards of quality if we don't know what those standards are or how to meet them. After reflecting on the first three barriers to quality—our emotions, a lack of time, and community beliefs—it should be clear that removal of this fourth barrier clears the path to quality. Here's why. The reason educators fear assessment and evaluation is that many don't understand it and therefore cannot gain control over it. But as we gain assessment wisdom we gain control, and anxiety dissipates. Thus, removal of barrier number four—a lack of assessment know-how—is the key to removing personal barriers to quality.

We have difficulty finding time to assess well because we lack knowledge of assessment tactics that can make our teaching job faster, easier and better. With assessment literacy comes the time to do the assessment job we are hired to do within the time allotted. Removal of barrier four is the key.

The reason many local educators have difficulty dealing with assessment concerns in their communities is that they lack the understanding and confidence to address these issues in a forthright manner. So they negotiate a treaty to do what was always done in testing, regardless of its appropriateness. But the more we know about assessment, the easier it is to help our communities understand what assessment practices are sound. So again, the development of assessment literacy is the key to removing this barrier.

A Plan for Removing the Barriers

Assessment-literate educators are masters of the basic principles of sound assessment. They know and understand the five standards of assessment quality defined previously. But more importantly, they are able to routinely apply those standards in their schools and classrooms.

High-quality professional development programs are needed to provide that foundation—especially given our long history of failing to train teachers and administrators in assessment. The objectives of a practitioner-centered professional development program in assessment, along with highly efficient training strategies, are outline below.

Program Objectives

Teachers and administrators are prepared to fulfill their ongoing assessment responsibilities when they:

1. Understand essential differences between sound and unsound assessment practices and commit to meeting key quality standards.

2. Know how to meet standards of quality in all classroom, school, and district assessment contexts.

3. Know how to use the assessment process as a teaching tool to motivate students to strive for excellence.

Assumptions Regarding Effective Professional Development Practice

The achievement of these objectives requires the design, development, and implementation of professional development strategies that:

- provide practical new assessment ideas and strategies in an efficient manner;

- offer classroom practice in applying those new strategies;

- give participants responsibility for managing their own development, and promote the sense of professionalism that comes from one's own pursuit of excellence;

- provide collegial support, where educators learn by sharing the lessons they have learned individually;

- deliver benefits very quickly to those who apply lessons learned in their classroom; and

- encourage a healthy concern for quality assessment by emphasizing its implications for student well-being and teacher effectiveness.

To satisfy these requirements, we recommend a professional development program that relies heavily on a blend of *learning teams* (also referred to as study groups or study teams) and *individual study* and experimentation by teachers as the basis of interaction and growth. In these teams, a small group of five to ten teachers and administrators agree to meet regularly to share responsibility for their mutual professional development.

Between meetings, each team member commits to completing assignments designed to advance his or her assessment literacy. They might, for example, study the same piece of professional literature and try the same assessment strategies, and then bring the lessons they have learned from that experience to share and discuss in the group meeting. Or team members might complete different assignments, learn different lessons, and meet to share a more diverse array of insights to the benefit of all.

Appendix A provides an extensive list of references selected to help educators develop their assessment literacy across and within academic disciplines. They offer an excellent basis for learning team collaboration.

Organizing for Professional Development

Some school districts elect to begin with a "leadership study team" comprised of a few key teachers and administrators from across the organization. This team's mission is three-fold: (1) develop their own high levels of assessment literacy, (2) devise a specific strategy for forming and offering support to multiple study groups throughout the district, and (3) conduct an ongoing evaluation of the professional development effort to determine its impact.

Another way to organize is to start a learning team in each building, blending interested administrators and teachers into the same team. This can have the effect of stimulating interest among others in that same building. As a variation on this, learning teams from different schools might agree to meet periodically in a larger collective effort.

Obviously, learning teams can be configured in any of a variety of ways. Groups might be formed on the basis of grade level (within or across levels) or within or across discipline (math, science, arts, etc.). Learning teams might come into existence as opportunities arise, when, for example, an ad hoc committee is assembled to evaluate and consider revising report card grading or when a curriculum-development team decides to deal with some underlying assessment issues. All such instances represent opportunities for developing effective assessment strategies.

Motivating Participation in Learning Teams

A district might allocate released time or extended contract time to permit teachers to be involved in any or all of these efforts. The promise of time to concentrate on one important topic long enough to internalize some new and useful ideas can be a strong motivator. This, combined with time to talk with and learn from colleagues (both very rare commodities for most educators), may be incentive enough for some. In addition, an ongoing working relationship can be established with a higher education institution to offer graduate credit for competence in assessment attained through study group work.

We also might look to other, more internal sources of motivation. For example, we are naturally motivated to strive for excellence when we have the opportunity to see ourselves improving. One way to take advantage of this is to encourage all learning team members to build a portfolio of evidence of their own improvement as classroom assessors, including a journal of self-reflection about one's evolving assessment competence and examples of assessments collected over time, with written commentary on

their increasing quality. Periodically, team members might also conduct "student-led conferences" detailing to the rest of the team their evidence of progress as an assessor.

The evidence of improved classroom-assessment competence, summarized across a sample of study group participant portfolios over a period of time, provides one basis for evaluating the success of the overall professional development program.

Summary

Instruction is most effective when it includes the use of quality assessments. Such assessments are built around users' needs, arise from clearly articulated achievement targets, rely on proper methods, sample student achievement appropriately, and avoid sources of bias and distortion that can lead to inaccurate results.

However, fear of accountability, a lack of time and other resources needed to assess well, and community or parent expectations can present imposing barriers to quality. The removal of these potential roadblocks requires the development of an assessment-literate school culture.

We have offered a plan for the development of that foundation of assessment literacy that places control of professional development in the hands of each practitioner. It calls for an individual commitment to learning about excellence in assessment but supports that effort with a collaborative team. If school districts can support the teamwork part of that process, motivated educators will ante up the rest.

Developing Assessment Literacy: Standards of Assessment Quality

Quality assessments:

- Reflect clearly specified and appropriate achievement expectations for students
- Designed specifically to serve instructional purposes

Section II: Activity 6
Handout/Transparency–Developing Assessment Literacy 2

- Accurately reflect intended target and serve intended purpose
- Provide representative sample of student performance on which confident conclusions can be based
- Designed, developed, and used so as to eliminate sources of bias or distortion that interfere with the accuracy of results.

(Quoted from Rick Stiggins)

Barriers to Quality Assessment:

- Personal–emotions
- Institutional–problem of lack of time
- Community–beliefs
- Ultimate barrier–Lack of assessment know-how

Suggested Program Objectives for Teachers and Administrators:

- Understand sound vs. unsound assessment practices and commit to quality
- Know how to meet standards of quality in all contexts
- Know how to use assessment process as a teaching tool to motivate students to achieve

As Rick Stiggins suggests, the key to achieving these objectives is effective professional development.

Section II: Activity 6
Handout/Transparency–Aligning Achievement Targets to Assessment Methods

Directions: Determine which assessment method(s) can be used to assess each achievement target by placing a check mark in the corresponding cell/box.

Target to Be Assessed	Assessment Method			
	Selected Response (e.g., multiple choice, T/F, matching, fill-in)	Essay	Performance Assessment	Personal Communication
Knowledge Mastery				
Reasoning Proficiency				
Skills				
Ability to Create Products				

Source: Blank chart of information in Rick Stiggins' Student-Centered Classroom Assessment, 2nd edition (1996)

Assessment-Related Lessons Learned

- Monitor student progress and disaggregate data; practice data-driven decision-making.
- Ensure that students are taught the SCOS on which they will be tested (curriculum alignment).
- Monitor assessment practices to determine that they are sound (e.g., appropriate method of assessment, alignment, unbiased, used to guide instruction).

Section II: Activity 6
Handout/Transparency–Lessons Learned 2

- **Encourage a variety of assessments; plan authentic assessments.**
- **Expect and encourage immediate, constructive feedback on student assessment.**
- **Teach and assess higher-order thinking skills.**
- **Provide staff development on assessment.**
- **Articulate the importance of assessment to staff and students (e.g., value of pre- and post-assessment in individual lessons).**

- **Set high expectations for student achievement and provide opportunities for success (including test-taking strategies, practice tests).**
- **Motivate students by practicing student-centered assessment.**
- **Provide incentives; celebrate successes.**

Section II: Activity 6
Handout–Reflection Sheet

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

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Section III: Site-Based Management and Other Reform Programs

SECTION III: ACTIVITY 1

TIME	PURPOSE	SETTING	MATERIALS
45 minutes	• To discuss the variety of definitions for Site-Based Management • To review emerging definitions • To provide rationale for Site-Based Management (SBM)	Whole Group Small Group Individual	Index cards Blank Transparency Markers Overhead Projector Handout—Belief Statements Transp.—Group Summary Transp.— Emerging Definitions Notes—Rationale for SBM Movement Transp.—Hoyle quote Transp.—Dewey quote

Optional reading

The presenter may wish to assign this article as optional or pre-activity reading. This article will provide a foundation or may be a reference for the remainder of the section.

The Who, What, and Why of Site-Based Management by Jane David

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Describe activity

Tell the participants that through our knowledge and experiences we have developed our own definition and beliefs of what schools should do and how they should operate.

Handout—Belief Statements

Using the Handout—*Belief Statements*—select the statements that best describe your beliefs about schools.

Use Transparency—*Belief Statement Group Summary* —to do a group analysis.

Explain that as school districts across the nation have been working to improve the educational system, many have implemented the Site-Based Management (SBM) model of education reform. There are many different perceptions and definitions of SBM.

Index cards Blank transparency Markers	Have participants record on index cards their definition of Site-Based Management and then share personal definitions with their table or small group. Record on transparency the most agreed upon definition (by consensus) from each table or small group. Discuss commonalities.
Transparency—Emergin g Definitions	Review and discuss Transparency—*Emerging Definitions.*

Examine the rationale for SBM movement

Using Notes—*Rationale for Site-Based Management*—lead a discussion on how and why this movement began.

Transparency —Hoyle Quote	Transparency—*Hoyle Quote*
Transparency—Dewey Quote	Transparency—*Dewey Quote*

Summary

Summarize major points covered during the activity and answer any questions participants may have.

Evaluation

If this activity is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section III: Activity 1
Notes—Rationale for SBM Movement

Rationale

Although there are many reasons for initiating site-based management, all are camouflaged in the language of increasing student achievement. For some, site-based management is a governance reform designed to shift the balance of authority among schools, districts, and states. Others believe that site-based management is a political reform initiated to broaden the decision-making base, either within the school, the larger community, or both.

More to the point however, those interested in site-based management as educational reform believe that the way to enhance student learning is to let education professionals make the important professional decisions. In 1903 John Dewey wrote

Transparency—Dewey quote

. . . until the public school system is organized in such a way that every teacher has some regular and representative way in which he or she can register judgement upon matters of educational importance, with the assurance that this judgement will somehow affect the school system, the assertion that the present system is not, from the internal standpoint, democratic seems to be justified.

For all of its guises, site-based management may be the most significant reform to date. According to Ogawa and White (1994), one-third of all school districts had some version of site-based management between 1986 and 1990. Since 1990, several states have jumped on the bandwagon.

Section III: Activity 1
Handout—Belief Statements

BELIEF STATEMENTS

Instructions: Review each of the following statements. Select the statements that best describe your beliefs about schools. Give a priority order to your top five statements (1 being the first priority).

____ 1. Schools should work to raise students' scores on state tests.

____ 2. Students, parents, and business/industry are the consumer of school services.

____ 3. Schools play an important role in developing the character and citizenship of students.

____ 4. The principal is the leader of the schools and should know what is necessary to manage a good school.

____ 5. Schools should be restructured to allow teachers to talk and work together more often.

____ 6. The State Standard Course of Study is the most important directive for the curriculum.

____ 7. Parents should have a voice in the development of the school program offered to their children.

____ 8. Teachers need ample quantity and quality resources to appropriately teach students.

____ 9. Schools should be both safe and fun; a place where students want to be.

____ 10. Schools should prepare students to be life-long learners, critical/creative thinkers and productive workers.

____ 11. Schools should consider students' learning styles and multiple intelligences when developing programs.

____ 12. To be able to compete in the workforce, "at risk" students need more resources and attention than our average students.

____ 13. We need less state control and more local control of our schools.

____ 14. Teachers need more time for planning and staff development.

____ 15. "It takes a village to raise a child;" schools can't be responsible for the education and safety of students in isolation from other institutions, agencies, and organizations.

____ 16. We should spend more of our resources on the education of our children during the early years than in their high school/college years.

____ 17. Schools should plan their programs based on the system level plan.

____ 18. It is difficult for a school to know where it is going if it does not have a clear vision/mission/goals/action plan.

____ 19. Year-round schools should be a parent-community decision, not a school decision.

____ 20. Extra-curricular activities (including athletics) should be part of the instructional program of a school and planned for and evaluated similarly.

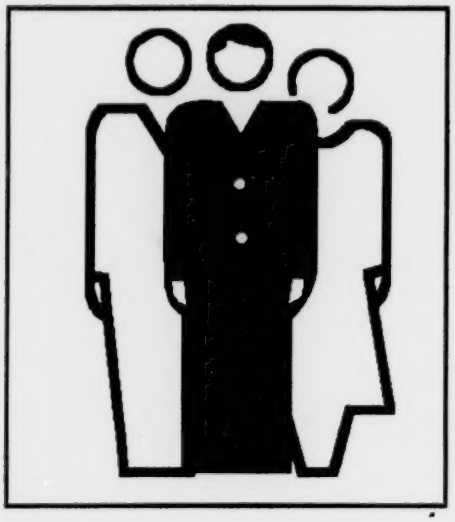
Section III: Activity 1

Transparency—Belief Statements Group Summary Sheet

	PARTICIPATING GROUPS					
STATEMENTS (Edited)	Principals	Teachers	Staff	Parents	Central Office	Others
1. Raise test scores						
2. Consumers of services						
3. Character and citizenship						
4. Principal is leader						
5. Teachers work together						
6. SCS directs curriculum						
7. Parents' voice in program						
8. Ample resources						
9. Schools safe/fun place						
10. Life-long learners						
11. Learning styles						
12. "At risk" students						
13. More local control						
14. Planning/staff dev. time						
15. ". . .village to raise a child"						
16. Early years vs. high school						
17. System level planning						
18. Vision/mission/goals/plans						
19. Year-round schools						
20. Extra-curricular						

Section III: Activity 1
Transparency—Hoyle

"People who must implement the decision must make the decision."
Hoyle



Section III: Activity 1
Transparency—Dewey

". . . until the public school system is organized in such a way that every teacher has some regular and representative way in which he or she can register judgement upon matters of educational importance, with the assurance that this judgement will somehow affect the school system, the assertion that the present system is not, from the internal standpoint, democratic seems to be justified."

John Dewey, 1903

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

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SECTION III: ACTIVITY 2

TIME	PURPOSE	SETTING	MATERIALS
30 minutes	• To examine the conceptual theme of site-based management • To examine the operational theme of site-based management	Whole Group	Overhead projector Notes—Variation on Theme Transp.—Variation on Theme Transp.—Conceptual Variation Transp.—Operational Variation Notes—Socratic Seminar Teaching Techniques

Describe activity

Tell participants that this activity will examine the conceptual view and the operational view of site-based management.

Notes/Handout—Variations on Theme

Using Notes/Handout—Variations on Theme—examine the conceptual and operational themes of site-based management. Start by using the transparencies below.

Transparency—Variations on Theme

Transparency —*Variations on Theme*

Transparency—Conceptual Variation

Transparency—*Conceptual Variation*

Transparency—Operational Variation

Transparency—*Operational Variation*

Whole group exercise

Socratic Seminar — After introducing the conceptual and operational variations of SBM, conduct a Socratic seminar on the two variations. A guide for conducting Socratic seminar is included.

Summary

Summarize major points covered during the activity and answer any questions participants may have.

Evaluation

If this activity is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section III: Activity 2
Notes/Handout—Variations on Theme

Variations on Theme

Although there are common elements of site-based management and some general agreement on the broad philosophical infrastructure, variations remain the rule in the operation of this approach to decentralization.

Conceptual Variation

Transparency—Conceptual Variation

Many analysts view the conceptual variation of site-based management as a political issue. They see SBM "largely as a political phenomenon involving the transfer of power to local councils" (Wohlstetter & Mohrman, 1993). Others view it as a form of school governance using politics as a lever for school change.

A second group of analysts view SBM as an issue in democracy or an attempt to open up schools systems to involve individuals/ groups not usually involved in school governance. The analysts in this group see SBM as participatory decision making as a collaborative approach in which executives and subordinates as well as community members work together as equals in an attempt to identify, analyze, and solve problems that an organization may face.

Others perceive SBM from leadership and organization perspectives. The individual school becomes the fundamental decision-making unit with the educational system and, as a result, authority is redefined through the system.

Still others perceive SBM as a moral issue. This group tends to hold three truths about shared decision making.

1) meaningful involvement of stakeholders is appropriate regardless of instrumental outcome.
2) teaching is a moral activity and as such should be subject to the control of teachers themselves.
3) SBM/shared decision making can also serve as a moral doctrine by which students can regulate their behavior.

Operational Variation

Transparency—Operational Variation

There is a significant variation the way SBM is operationalized in school districts and individual schools. For that reason we will now look at the operational focus of site-based management. Many districts consider SBM more as a frame of mind or orientation that a structured, technical way of operation What this means in practice is that districts establish basic parameters regarding SBM, however, they leave specific details of the governance process up to the individual school. Beyond a statement of often too broad goals, districts provide little clarification of teachers' decision domains or authority and little guidance about how to establish the shared decision making process.

Participatory decision making differs across districts because districts stress different pieces or strands of SBM. One district may focus on decentralizing control from the central office to the individual school, whereas another district may focus on a shift in the locus of initiative from individuals who have responsibility for the entire organization to individuals who have responsibility only for a particular area or function.

Section III: Activity 2

Transparency—Variations on Theme

The organization and operation of SBM programs is extremely diverse. Programs operate in different ways and in different local contexts with no discernible common model.

Clune and White, 1988

Section III: Activity 2
Transparency—Conceptual Variation

SBM is a proposal to decentralize and debureaucratize school control. For some of its advocates, it is also a proposal for shared decision making within schools. And for some, it is a method of increasing the influence of parents in school decision making.

Sackney & Dibski, 1992

There is no standard version or model of site-based management. Schools operating under the rubric of site-based management have varying degrees of control and make some or all decisions about curriculum, instruction, personnel, and budget. In addition, there is great variation in the way teachers and parents are being involved in planning and decision making.

Wagstaff & Reyes, 1993

Section III: Activity 2
Notes—Socratic Seminar Teaching and Techniques

1. As you read the text selected for Socratic seminar, make a list of the key words, ideas, issues, values, and principles you find in it. (Do not list facts as they are not discussible.)

2. Prepare no more than three questions: one to open the seminar, one to examine the heart of the text, and one to close the seminar. Your planned questions are crucial to the success of the seminar. Remember that the main objective of a seminar is to obtain a better understanding of the ideas, issues, and values in the reading; consequently, your questions must elicit appropriate topics for discussion. The seminar is an opportunity to discuss in-depth selected ideas, issues, or values in the text.

3. Opening Question. Review the list of ideas, issues, values, and principles you discovered in the text and develop a clear, concise question that will cause the participants to think about their findings. An opening question should be broad and general, related to the text, have more than one possible answer, and elicit a response from each participant.

4. Core Question. As a general rule, the core question is rather specific and focuses on one or two ideas, issues, or values. Frequently, a carefully planned core question may be used as an opening question.

5. Closing Question. The closing question often makes the text relevant to the audience or asks the participants to examine what they believe about the topic.

6. Follow-up Questions. Developing appropriate opening, core, and closing questions for the seminar is a major task of the leader. Two other tasks have equal importance. You must listen to the responses and question them until the participants have a better (deeper, clearer, etc.) understanding of the idea, issue, value, or principle being discussed. A seminar is a guided discussion and the leader is responsible for that discussion and conversation. Your task is to get the participants talking and questioning each other.

An effective leader routinely asks participants to define or describe words and phrases often used but not understood. Educators, as do other professionals, often use jargon or popular phrases that they are unable to clearly describe, define, or explain. Ask for explanations of terms such as all children can learn, reach his potential, school of excellence, intelligence, and high academic standards.

7. Evaluate your Questions. Your opening question must elicit for discussion the most important ideas, issues, and values in the text.

- Avoid opening, core, and closing questions that can be answered without reading the text. (Example: What is justice?)
- Opening, core, and closing questions should elicit more than a one-word response or phrase.

8. Closing the Seminar. When the seminar time period is almost over, you simply stop asking questions and thank the participants for their careful reading and thoughtful comments. Give no summary of what you hope they learned. You want them to leave the seminar with more questions than answers.

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

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Statement	SA	A	D	SD
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2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

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SECTION III: ACTIVITY 3

TIME	PURPOSE	SETTING	MATERIALS
45 minutes	• To discuss the logic of SBM by examining the premise and assumptions of SBM	Whole Group Small Group Individual	Notes—Embedded Premise and Assumptions of SBM Overhead Projector Transp.—Embedded Premise Transp.—Assumptions Transp.—Embedded Logic of SBM (1) Transp.—Embedded Logic of SBM (2)

Describe activity

Tell participants that in this activity they will focus the inherent logic in the SBM model while examining its premise and assumptions.

Premise/ assumptions

Ask participants to share their basic premise of SBM. Record responses on transparency.

Notes—Embedded Premise/Assumptions

Tell participants the one central premise of the site-based management model: *Those closest to a situation are uniquely positioned to address their needs and the needs of their clients.*

Transparency—Embedded Premise

Using Notes—*Embedded Premise and Assumptions*—analyze the premise and assumptions of the site-based management model.

Transparency—Assumptions

Note: Participants will need photocopies of Transparency/Handout—The Embedded Logic of SBM (1) and Transparency/Handout—The Embedded Logic of SBM (2)

Transparency/Handout—The Embedded Logic of SBM (1)

Transparency—Components

Transparency/Handout—The Embedded Logic of SBM (2)

Small group exercise

Transparency—Embedded Logic of SBM (1)

Transparency/Handout—*The Embedded Logic of SBM (1)*

Based on prior knowledge and information discussed in this and previous activities, participants should categorize the components of SBM using Transparency/Handout—*The Embedded Logic of SBM (1)*—under the major headings. Participants should also use arrows to show where linkages may occur.

Discuss Components

Transparency—Components

Using Notes—*Embedded Premise and Assumptions* —lead a discussion on the five components.

Whole group exercise

Transparency—The Embedded Logic of SBM (2)

During the explanation of the components, you may allow participants to make changes to their handout of The Embedded Logic of SBM (1). After explanation of components use Transparency—*The Embedded Logic of SBM (2)*—to show the actual linear relationships between components and linkages.

Summary

Summarize major points covered during the activity and answer an questions participants may have.

Evaluation

If this session is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section III: Activity 3

Notes—Embedded Premise and Assumptions

Embedded Premise

The Site-based Management model is based on assumptions that can be clearly specified. However, at the center of the model is one central premise: Those closest to a situation are uniquely positioned to address their needs and the needs of their clients.

Transparency—Embedded Premise

Transparency—Embedded Premise

Assumptions

Embedded in this belief that "decisions should be made at the lowest possible level (David, 1989, p. 46)"—that "activities that directly impact the students on a day-to-day basis must be determined as close to the students as possible" (Candoli, 1991, p. 40) — are six assumptions:.

Transparency—Assumptions

Transparency—Assumptions

(a) "that those most closely affected by school-level decisions—teachers, students and parents—ought to play a significant role in making decisions" about school affairs;"

(b) that "stakeholders in the school system . . . have the right and responsibility to be involved in the decision making process;"

(c) that "students, parents, school staffs and communities have unique needs, and that these needs can best be identified and addressed by them;"

(d) that because the school is the fundamental decision-making unit within the educational system, "schools have to be given the capacity to identify and respond to student needs;"

(e) that "imposed educational decisions disempower certain categories of stakeholders;" and

(f) that "those actors with the best information about a particular subject should have the discretion to make decisions about that subject" and that "schools often know best,"— "the people in closest contact with students are the ones most likely to make good decisions."

From the assumptions examined, we can logically deduce that SBM empowers local stakeholders; empowerment promotes ownership, which in turn increases professionalism and enhances organizational health; and changes in these two variables result in improved organizational performance.

Small group exercise

Transparency/Handout—The Embedded Logic of SBM (1)

Based on prior knowledge and information discussed in this and previous activities, participants should categorize the components of SBM using Transparency/Handout—*The Embedded Logic of SBM (1)*—under the major headings. Participants should also use arrows to show where linkages may occur.

Transparency—Embedded Logic of SBM (1)

Discuss Components

Empowerment

Empowerment is the initial step in the site-based management process; the enhancement of authority at the local level. The goal is to empower school staff by providing authority. Authority leads to: *autonomy, voice, decision involvement, influence, and rights.*

Ownership

A sense of ownership by stakeholders (teacher, students, communities) gives members a greater personal stake in seeing their decisions succeed.

Professionalism

Empowerment and ownership influence three elements related to professionalism: *commitment, efficacy, and satisfaction/morale.* Teachers' involvement in decision making enhances their sense of efficacy or "professional confidence," both of which are believed to enhance school performance.

Organizational Health

For the purpose of analysis, organizational health is divided into two groups: General Organizational Processes and Learning and Teaching.

General organizational processes establish a basis for informed stakeholders to make quality decisions based on the needs of the students. Advocates of SBM believe that this model will produce more effective and responsive decisions, thereby producing more efficient decisions. As has been previously stated, the purpose of SBM (like any other movement in participatory management system) is to improve performance by making those closest to the delivery of services (instruction) more independent and therefore, more responsible for the results.

Organizational Health, contd.

Learning and Teaching. Of course participatory decision making affects the conditions of teaching and learning. Teachers will be encouraged to teach things differently and better. Participatory decision-making efforts will obtain improved educational programs and promote continuing school improvement by directing attention to issues of curriculum and students.

Performance

Viewing from the perspective of the entire educational system, advocates contend that because shared decision-making structures foster competition, the overall well-being of the system will improve.

By shifting formal decision-making away from central administration to a smaller decision making arena—the school—advocates argue that school productivity will increase because decisions regarding the educational program will be made by those most closely affected by them.

Also vital to the supporters of SBM is the belief that student outcomes will improve as the principal, teacher, and parents collaboratively decide upon needed programs and practices.

Already discussed is the link that decentralization fosters greater satisfaction for communities.

Section III: Activity 3
Transparency—Embedded Premise

An assumption of school-site management is that those persons closest to the students should make decisions about the education programs (that is, curriculum, instruction, and the organization of time, people, facilities, and other resources) for those students. The hypothesis of school-site management is that such a practice will result in increased student performance through a more effective organization.

Mojkowski & Fleming, 1988

Section III: Activity 3
Transparency—Embedded Premise

Reformers hoped that these new arrangements would create a political force for improvement in school communities. It was argued that such a politics could leverage the organizational changes needed to make schools more responsive to the communities, families, and students they serve and ultimately boost educational achievement.

Bryk, 1993

Section III: Activity 3
Transparency—Assumptions

(a) that "those most closely affected by school-level decisions—teachers, students and parents—ought to play a significant role in making decisions" about school affairs (Wohlstetter & Buffett, 1991);

(b) that "stakeholders in the school system . . . have the right and responsibility to be involved in the decision making" process (Burke, 1992);

(c) that "students, parents, school staffs and communities have unique needs, and that these needs can best be identified and addressed by them" (Jewell & Rosen, 1993);

(d) that because the school "is the fundamental decision making unit within the educational system" (Guthrie, 1986), "schools have to be given the capacity to identify and respond to student needs" (Stevenson, 1990);

(e) that "imposed educational decisions disempower certain categories of stakeholders" (Burke, 1992);

(f) that "those actors with the best information about a particular subject should have the discretion to make decisions about that subject" (Hannaway, 1992) and that "schools often know best" (Brown, 1991).

COMPONENTS

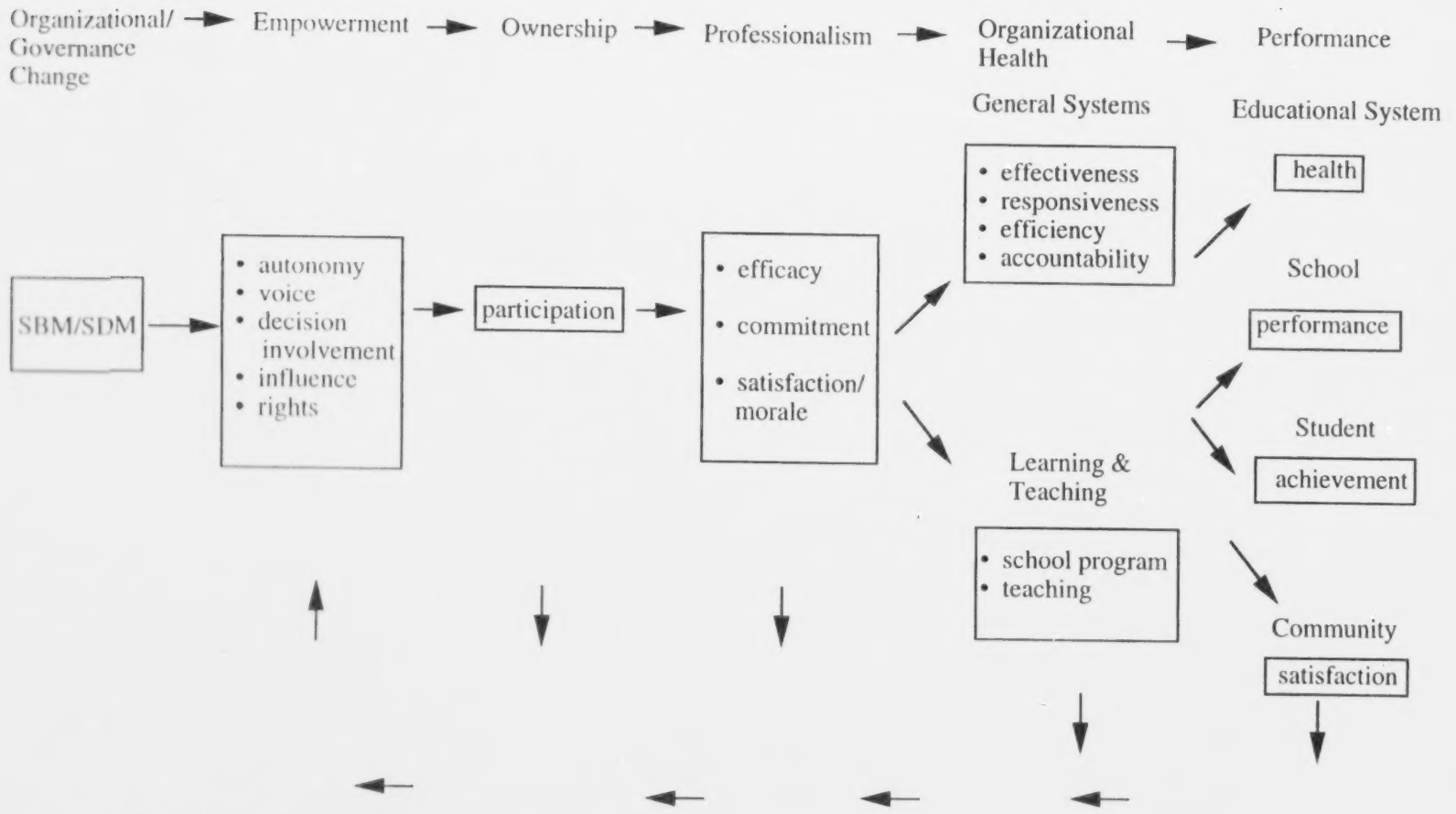
Educational System
Learning & Teaching
Community
School
General Systems
performance
Student
achievement
autonomy
school program
influence
decision involvement
satisfaction/morale
health
rights
teaching
effectiveness
SBM/SDM
responsiveness
accountability
efficiency
participation
efficacy
commitment
satisfaction
voice

SESSION III: Activity 3
Transparency/Handout: The Embedded Logic of SBM (1)

Organizational/ Governance Change	→ Empowerment	→ Ownership	→ Professionalism	→ Organizational Health	→ Performance

The Embedded Logic of SBM
School-Based Management as School Reform Taking Stock
Joseph Murphy and Lynn Beck, 1995

SESSION III: Activity 3
Transparency/Handout: The Embedded Logic of SBM (2)



The Embedded Logic of SBM
School-Based Management as School Reform Taking Stock
Joseph Murphy and Lynn Beck, 1995

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION III: ACTIVITY 4

TIME	PURPOSE	SETTING	MATERIALS
2 hours	• To examine the context of SBM • To examine the models of SBM • To review the domains of SBM	Whole Group Small Group Individual	Notes—Context of SBM Transp.—GS 115C-105.21(b) Transp.—GS 115C-105.21(a) Transp.—SBM will: Transp.—SBM will not: Transp.—Lindelow quotes Transp.—Wohlstetter & Odden quote Transp.—Bimber quote Venn diagram Chart paper Markers Overhead projector

Describe activity

In the previous activity, we examined the definition and premise of SBM. During this activity we will analyze the context of SBM as well as the manner in which decisions are made or the "models of SBM," and the kind of decisions that are made or the "domains of SBM.

Context of SBM

Notes—Context of SBM

Transp.— GS 115C-105.21(b);

Transp.— GS 115C-105.21(a);

Transparency—GS 115C-205.21(b)

Using Notes—*Context of SBM* —examine the context of SBM from the state, district, and school perspectives. Notes include the references to the following transparencies:

- *GS 115C-105.21(b)*
- *GS 115C-105.21(a)*

Trainer may view statutes in their entirety at the following website: www.ncga.state.nc.us/html1999/statutes

Transp.— SBM will:

Transp.— SBM will not:

- *SBM will:*
- *SBM will not:*

The following article may be discussed during this phase of the activity:

- *Planning and Training to Implement Site-Based Management* by Fred H. Wood and Sarah D. Caldwell

(See Bibliography for complete information necessary to locate articles.)

Models of SBM

Transparency—Elmore

Notes—Models of SBM

Using Notes—*Models of SBM* —examine the models of SBM and the differences between them. Notes include the references to the following transparencies:

Transp.—Lindelow quotes
Transp.—Wohlstetter & Odden quote
Transp.—Bimber quote

- *Lindelow quotes*
- *Wohlstetter & Odden quote*
- *Bimber quote*

Sample Venn diagram
Chart Paper
Markers

Using a Venn diagram ask participants to compare two of the three models of SBM. Transfer to chart paper and share with group.

Describe activity

Allow participants to select one of the articles below to read and prepare a summary for the group. Depending upon the number of participants, you may be able to assign articles individually or in small groups. All participants should receive a copy of each article.

Articles—

- *Principal's Perceptions of Site-Based Management and Teacher Empowerment* by Sam Lucas, Gilbert Brown, and Frank Markus.
- *Do Teachers Feel Empowered* by Jianping Shin.

(See Bibliography for complete information necessary to locate articles.)

Domains of SBM

Transp.—Heller et al.

Transp.—Lindelow

Using Notes—*Domains of SBM* examine and discuss five domains of SBM. For this activity you may wish to reference Section I: Activity 4 which reviews missions and visions; and Section II: Activity 4 which discusses budgeting.

Notes include reference to the following transparencies:

- *Heller et al.*
- *Lindelow quote (3)*

Exercise

Jigsaw

Assign the articles below as a jigsaw activity. Each table or small group will receive one of the articles and decide how it is be divided among the group members. Participants are responsible for reading the assigned sections, learning it and becoming an "expert" on the content. Each table group plans how they will teach the material to the whole group. Other groups are responsible for learning the materials when it is presented.

Articles—

- *Seeking Common Ground: Goal-Setting with All Constituencies* by Tony Wagner
- *One Step at a Time—SBM as an Incremental Process*

(See Bibliography for complete information necessary to locate articles.)

Summary

Summarize content of this activity and answer any questions participants may have.

Evaluation

If this session is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section III: Activity 4
Notes—Context of SBM

State→District

The amount of autonomy that can be decentralized from the district to the school is dependent upon the degree of freedom granted to local districts by state regulations.

Transp.—GS 115C-105.21(b)

Transparency—GS 115C-105.21(b)

Central to the SBM school reform model are efforts to enhance the authority enjoyed by school systems that can be used to empower stakeholders at the school-site level.

Most states employ a three-pronged strategy to address the restrictions that state regulations impose on school-based decision making:

- full deregulation
- deregulating of top performers
- granting exemptions or waivers to existing regulations

(Referring to GS 115C-105.20 ask participants to identify which strategy North Carolina has legislated.)

In 1989 the North Carolina General Assembly enacted the School Improvement and Accountability Act which gave local districts (participation optional) money for instructional materials, supplies and equipment, textbooks, testing support, and driver education in a lump sum, to be spent as they wished. However, participants were held accountable for reaching 75% of their goals.

Current legislation mandates participation in the School-Based Management and Accountability Program and provides increased local control of schools with the goal of improving student performance.

Transp.—GS 115C-105.21(a)

Transparency—GS 115C-105.21(a)

District→School

As local districts redesign the operational structure of the central office, the role of central office administrators change from regulator or initiator to service provider.

The primary function of the central office must be to assure that individual schools have what they need to be successful. According to Hirsh and Sparks (1991), under some decentralized plans, central office departments are becoming service centers for schools.

In helping support local decision-making, the function of central office personnel changes from attempting to ensure uniformity across schools to orchestrating diversity to ensure that the common educational goals of the system are met.

In districts implementing SBM, central office personnel are spending less time initiating projects and more time serving as brokers of central office services.

In one sample of SBM districts in Kentucky, the central office facilitative role has meant less emphasis on telling, more advisory work and consultation, additional legwork in securing information for schools, and becoming more of a transmitter of information rather than a developer of strategies.

In Riverside, California, decentralization involved a change in communication patterns inside and outside the office to one of listening; changed decision-making to consensus, and changed workstyle to facilitation.

While restructuring to site-level decision-making, the focus must continue to be improved student achievement. It is important to remember what SBM will and will not do.

Transp.—SBM will:

Transp.—SBM will not:

Show Transparency—SBM will:

Show Transparency—SBM will not:

Section III: Activity 4
Notes—Models of SBM

Transp.—Elmore quote

Use Elmore's quote as a starting point for examining the models of SBM. It is important to remember that site-based management plans distribute authority differently. Clarity can be gained by focusing on the question of whose interests are to be served.

We can concentrate on five different groups—students, teachers, administrators, parents, and community members.

At this time we will focus on three models of SBM:

- *administrative control* - principals assume decentralized authority;
- *professional control* - influence pushed down to the school level resides primarily in the hands of the teachers; and
- *community control* - parents (and members of the larger community) hold the balance of power.

Administrative control

Transparency—Lindelow quotes

Transp.— Lindelow quotes

Decentralization does not necessarily mean the diffusion of power among workers. Decentralization in the administrative control model of SBM means only that discretion over decisions rest with the leader. The authority and power rest with the building principal; teachers and parents serve in an advisory capacity.

Building leaders involved in the administrative control model of SBM will often consult teachers and parents (site councils) and rely heavily on their input, but will make the final decisions and take responsibility for those actions, right or wrong.

Professional control

Transp.—Wohlstetter & Odden

Transparency—Wohlstetter & Odden quote

The professional control model of decentralization alters the balance of power between the principal and teachers. Professional control is a method of shared decision-making—shifting from control of all important issues by the principal to some degree of open discussion with the staff. Under shared decision making all decisions are made by vote or consensus, preferably consensus.

Site councils are usually the formal vehicle used to operationalize professionally controlled or "teacher-driven" models of SBM although site councils can be composed of individuals other than school staff. Ideal site councils are composed of the site principal, teachers, and community members/parents.

Community control

Transp.—Bimber quote

Transparency—Bimber quote

The community control model of SBM, in contrast to the professional and administrative control model, shifts power to community groups not previously involved in school governance.

Parents and citizens in general control the district or school using a voting process. Community control implies a legal provision for an elected community school board functioning under specific guidelines and in conjunction with the central school board. It means a sharing of decision-making authority and power between the local and central school boards; it also means that the powers of the professional and central school board members are in part abridged and transferred to community groups.

Models summary

There are two main points to keep in mind.

First, these three models of SBM represent theoretical categories of decentralization. In practice, they represent an extensive array of transformations.

Second, there is variety in the functions of local school councils. Councils vary from those composed of the principal and teacher representatives to those composed of parents, business/

community representatives, and district staff. Students usually serve on high school councils and may serve as liaisons to the council in lower grades.

Section III: Activity 4
Notes—Domains of SBM

Transp.—Heller et al.

Examine the Domains of Site-Based Management

One could correctly assume that there are few consistent patterns in the scope of decisions given to schools under site-based management. Common dimensions of decentralization can be identified; but programs differ on which dimension is decentralized. In some districts, SBM has afforded local sites a significant degree of control over three broad areas related to day-to-day operations: budget, personnel, and curriculum. Other districts limit control to possibly one or two of these areas. Still others include these three along with goal setting and organizational structure. We will examine all five.

Goals

Also see Mission/Vision in Section I: Activity 4

Overwhelming, most SBM programs restrict teacher decision making to operational issues with little attention given to subjects such as overall vision and mission.

Well-developed goals contain values on which collective action can be taken. For this reason it is important that schools be given the freedom to determine their goals. These goals also represent an agreement on principles that guide the resolution of day-to-day issues.

Budget

Typically, the area of school finance has been dominated by district superintendents and central office staff. Traditionally, schools have always maintained control over some pool of discretionary resources.

Also see: Budgeting in Section II: Activity 4

To meet the minimal definition of SBM it would seem that a school must receive a lump sum budget to allocate as it sees fit; although, there may be some exclusions and limitations. For example, salaries might be excluded from this sum and regulated at the district or state level.

Article—One Step at a Time, Mark Conrad

Reasonable site-based budget items may include the purchase of supplies and services directly from private suppliers, instructional cost decisions, and the purchase of technical assistance services from inside or outside the district. Another spending issue that some SBM model program schools enjoy is the ability to carry over funds from one year to the next

Personnel

Transparency—Lindelow quote (3)

Transp.—Lindelow quote (3)

Prior to the age of decentralization, teachers were hired at the district level and sent to the school. In the least restrictive model of SBM, the allocation of teaching positions is determined at the district level

Personnel, contd.	and regulated at the state level. SBM models shift the interviewing and hiring of teachers to the school site. Under more comprehensive models of SBM, allocation of professional personnel is not predetermined. Schools are free to select personnel and have the option of using funds budgeted for teachers for other purposes. For example, money allocated, in principle, for a teacher may be used to purchase books and materials or to hire two or three instructional support persons. Even in the most advanced cases of decentralization, authority for the employment of the principal is held by members of the local school board. Although teachers may be given an opportunity to interview or serve on an interview panel, the decision rests with the local board.
Curriculum	In most instances, state or local boards establish an outline for the curriculum. Therefore, freedom in the area of curriculum means that schools have the right to teach competencies and objectives in any manner they would like and select instructional materials, texts, learning activities and instructional materials. The more comprehensive model of SBM would allow schools to do all of the above as well as use a school-based curriculum with specifically designed goals, objectives and expected outcomes.
Organizational structure	Organizational structure examines the construct of the school day and alternatives to the model of the an individual teacher working with 25 to 35 students during a 50-minute block. At the elementary level, schools are creating programs that dramatically change the grouping of students by age and ability.

The School-Based Management and Accountability Program shall provide increased local control of schools with the goal of improving student performance.

Section III: Activity 4
Transparency—GS 115C-105.21(a)

Local school administrative units shall participate in the School-Based Management and Accountability Program.

SITE-BASED MANAGEMENT will:

create open communication among parents, teachers, other staff, principals, community members, local boards, superintendents which focuses on improving education for all children.

SITE-BASED MANAGEMENT will not:

Change the governance structure

- **local boards still retain their legal authority**
- **superintendents and principals retain their responsibilities for what takes place in their school systems and schools.**

Section III: Activity 4
Transparency—Elmore

To say that authority and responsibility for key decisions should be "decentralized" in an educational system is to say very little, in the absence of some set of beliefs about who are the objects or beneficiaries of decentralization, whose interests are to be served by decentralization, and how decentralization is supposed to serve those interests.

Elmore, 1993

Section III: Activity 4
Transparency—Lindelow quotes

It is possible, as noted earlier, to shift power from the central office to the school site without decentralizing it further.

Lindelow, 1981

In a school-based management system, the principal becomes the center actor.

Lindelow, 1981

A second SBM model features teacher control by delegating decision-making down the ranks of the professional hierarchy to building-level educators. Thus, individual schools, typically through site councils where teachers have the majority, are empowered to make some decisions formerly made by the central administration.

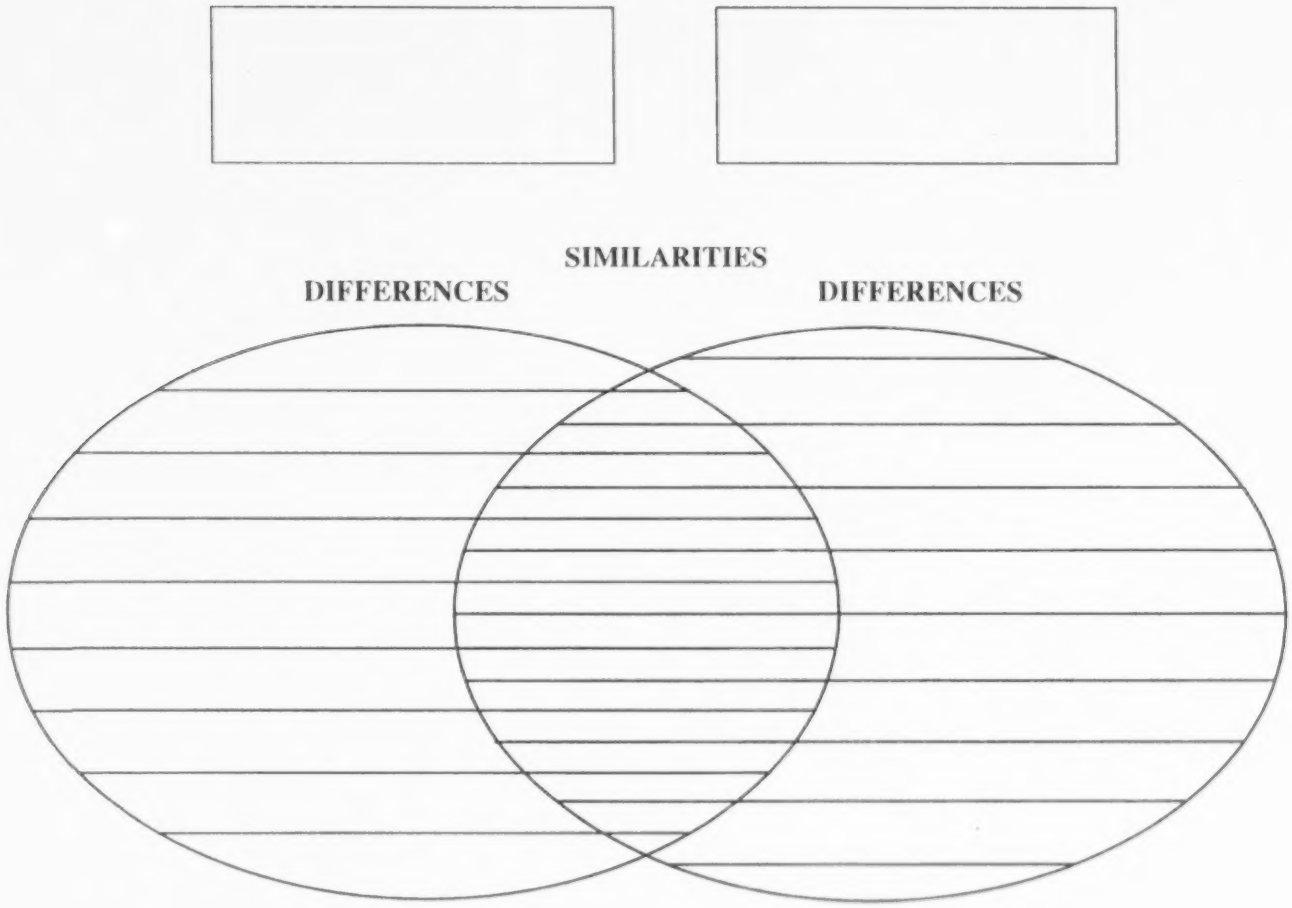
Wohlstetter & Odden, 1992

Section III: Activity 4
Transparency—Bimber quote

Site-based management often takes the form of political decentralization, involving parents and citizens in the making of decisions.

Bimber, 1993

Section III: Activity 4
Transparency/Handout–Venn Diagram



Section III: Activity 4
Transparency—Heller et al.

Data from a nationwide survey of school districts on areas [domains] included in SBM plans reveal that individual schools are the locus for decisions about scheduling on 91 percent of the cases, purchases (85 percent), budget (74 percent), and staffing (62 percent). Maintenance, curriculum, and textbooks are matters slightly more than half of the schools decide. Only 37 percent make hiring decisions at the building level, and 22 percent do teacher evaluation. Fewer than 10 percent determine the school calendar, length of day, starting salaries, and raises.

Heller et al.

Section III: Activity 4
Transparency—Lindelow quote 3

If principals are to tailor their schools' educational programs to the needs and desires of the community, they must have control of their major resource—teachers.

Lindelow, 1981

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. **What was the most useful part of this session?**
   •

2. **What did you learn from this session?**
   •

3. **How will this help you in your position?**
   •

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION III: ACTIVITY 5

TIME	PURPOSE	SETTING	MATERIALS
2 hours	• To describe the categories of reform models • To provide a brief description of 12 widely implemented reform models • To conduct an in-depth analysis of each of the described models	Whole group Small Group Individual	Notes—Categories of Reform Handout—Effective Practices Used by Educational Reform Programs Transp.— Effective Practices Used by Educational Reform Programs Activity Sign-Up Sheet

Describe activity

Explain that activity has four parts.

Part I —Participants will receive a general overview of categories of reform models and a brief description of 12 widely implemented programs.

Activity sign-up sheet

Part II—Participants (working in groups of no more than three) will select one model and conduct research (electronically) to ascertain the following

- origin/scope
- general description
- results
- implementation (project capacity, faculty buy-in, initial training, follow-up coaching, networking, implementation review)
- costs
- student populations
- identify North Carolina implementation/operational site(s)
- special considerations

Refer to Needs Assessment Packet for information on conducting structured interviews

If possible, participants may opt to arrange on-site visits and conduct structured interviews with administration, faculty and staff.

Part III—Participants will present their research to the whole group and provide hard copies for cohorts. The research should include websites.

Handout—Effective Practices Used by Educational Reform Programs

Part IV—As a whole group exercise, using the information presented on each program, conduct an analysis of effective practices used by education reform programs. (Handout—*Effective Practices Used by Educational Reform Programs* and Handout—*Effective Practices Used by Educational Reform Programs Illustrated)*

Summary	Summarize major points covered during the activity and answer any questions participants may have.
Evaluation	If this activity is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form.

Section III: Activity 5
Notes—Categories of Reform Models

Categories of reform models	Reform programs fall into two major categories: comprehensive or curricular.
Comprehensive	Comprehensive school reform programs focus on school governance and organization and may also include emphasis on revised curricular content.
Curricular	Curricular reform programs emphasize content in one or more academic disciplines.
Widely implemented models	
Accelerated Schools (1)	Accelerated Schools (Hopenberg, Levin, & Associates, 1993) A comprehensive reform program that improves student learning through enriched curriculum and instruction, improved school climate, and school organizational changes based on stakeholder input (e.g., teachers, students, family, community).
Coalition of Essential Schools (2)	Coalition of Essential Schools (MacMullen, 1996) A site-based reform founded on nine principles encourage students to think critically and use their minds well. Teachers facilitate learning through coaching, and students demonstrate their skills through authentic assessment.
Community for Learning (3)	Community for Learning (Wang, 1992, 1997) A data-based, comprehensive K-12 program that focuses on high academic achievement and positive student self-perception, and enhances schooling and life opportunities. The program includes a site-specific implementation planning framework that incorporates a school-wide organizational structure, and a coordinated system of instruction and related services delivery.
Core Knowledge (4)	Core Knowledge (Hirsch, 1993) A curriculum that develops students' cultural literacy by providing important knowledge about history, literature, geography, math, science, art, and music.
Different Ways of Knowing (5)	Different Ways of Knowing (Catterall, 1995) A reform that builds upon students' multiple intelligences and uses an interdisciplinary social science curriculum to strengthen students' verbal, mathematical, logical, social, and artistic skills.

Widely implemented models, contd.

Foxfire (6)	Foxfire (Wigginton, 1966) A learner-centered approach to education that is academically sound and promotes continuous interaction between students and their communities to help students find fulfillment as creative, productive, critical citizens.
HOTS (7)	HOTS (Higher Order Thinking Skills) (Pogrow, 1995) A pullout program that develops students' higher order thinking skills using technology and Socratic methods to replace the drill and practice approach used in many Title I programs (grades 4-6).
National Writing Project (8)	National Writing Project (Smith, 1996) A program designed to improve student writing by providing professional development opportunities to teachers and stressing the role of the teacher as expert.
Paideia (9)	Paideia A rigorous, liberal arts program designed to develop students' minds through a curriculum stressing classical works, didactic instruction, Socratic questioning and coaching.
Reading Recovery (10)	Reading Recovery (Pinnell, 1995) A pullout program that provides one-on-one tutoring by highly trained reading teachers for early readers with reading problems so that they may read at grade level and continue improving without further remediation.
School Development Program (11)	School Development Program (Comer, 1996) A comprehensive program that unites the resources of the school, family, and community to promote holistic child development.
Success for All (12)	Success for All (Clavin, Madden, Dolan, & Wasik, 1996) A program that stresses reading and language arts and helps schools and classrooms in preventing academic deficiencies and in intervening, as needed to overcome problems. This program is based on the premise that all students can and should succeed, and utilizes homogeneously grouped small-group instruction and one-on-one tutoring.

*Taken from Achieving Student Success - A Handbook of Widely Implemented Research Based Education Reform (www.reformhandbook-LSS.org)

Section III: Activity 5
Handout—Effective Practices Used by Educational Reform Programs

Program Practices	1	2	3	4	5	6	7	8	9	10	11	12
Classroom Practices												
High expectations for students												
Frequent, high-quality, academic interactions among teachers and students												
Metacognitive strategies												
Student-directed learning												
Direct instruction												
Small-group instruction												
Frequent, high quality, social interactions among teachers and students												
Cooperative learning												
Positive classroom climate												
Adaptive instructional strategies												
Peer Tutoring												
Tutoring by teacher, teacher aide, or student												
Curriculum and Assessment												
Alignment of curriculum and assessment												
Tailored to student ability and academic background												
Integration of content areas												
Tailored to student cultural background												
Use of individual learning plans												
Frequent assessments												
School Organization and Climate												
Parent Involvement												
Principal as facilitator and support provider												
Community involvement												
Positive school-wide climate												
Small class size												
Shared decision making												
[Use Legend to identify program numbers]												

225

Section III: Activity 5
Transparency/Handout—Effective Practices Used by Educational Reform Programs

Legend

1 Accelerated Schools

2 Coalition of Essential Schools

3 Community for Learning

4 Core Knowledge

5 Different Ways of Knowing

6 Foxfire

7 Higher Order Thinking Skills

8 National Writing Project

9 Paideia

10 Reading Recovery

11 School Development

12 Success for All

Section III: Activity 5
Handout—Effective Practices Used by Educational Reform Programs Illustrated

Program Practices	1	2	3	4	5	6	7	8	9	10	11	12
Classroom Practices												
High expectations for students	X	X	X	X	X	X	X	X	X	X	X	X
Frequent, high-quality, academic interactions among teachers and students	X	X	X	X	X	X	X	X	X	X	X	X
Metacognitive strategies		X	X		X		X	X	X	X	X	X
Student-directed learning		X	X			X		X		X	X	X
Direct instruction			X	X			X		X	X	X	X
Small-group instruction	X		X			X	X		X		X	X
Frequent, high quality, social interactions among teachers and students	X	X	X		X	X				X	X	
Cooperative learning	X	X	X			X			X		X	X
Positive classroom climate	X	X	X		X	X					X	
Adaptive instructional strategies			X				X			X	X	X
Peer Tutoring	X		X		X	X						X
Tutoring by teacher, teacher aide, or student			X				X			X		X
Curriculum and Assessment												
Alignment of curriculum and assessment	X	X	X	X	X	X	X	X	X	X	X	X
Tailored to student ability and academic background	X	X	X		X		X			X	X	X
Integration of content areas	X	X	X		X	X		X	X		X	
Tailored to student cultural background	X	X			X	X				X	X	X
Use of individual learning plans			X							X	X	X
Frequent assessments			X						X	X		X
School Organization and Climate												
Parent Involvement	X	X	X	X	X					X	X	X
Principal as facilitator and support provider	X	X	X				X				X	X
Community involvement	X		X		X	X		X			X	
Positive school-wide climate	X	X	X								X	
Small class size	X						X		X			X
Shared decision making	X	X	X								X	
[Use Legend to identify program numbers]												

Section III: Activity 5
Activity Sign-Up Sheet

Model	*Participant*	*Participant*	*Participant*
Accelerated Schools			
Coalition of Essential Schools			
Community for Learning			
Core Knowledge			
Different Ways of Knowing			
Foxfire			
Higher Order Thinking Skills			
National Writing Project			
Paideia			
Reading Recovery			
School Development			
Success for All			

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION III: ACTIVITY 6

TIME	PURPOSE	SETTING	MATERIALS
1.5 hours	• to examine barriers to implementation of SBM	Whole group Small group Individual	Overhead projector Chart paper Markers Masking tape Notes—Research Findings Transp.—Barriers to Reform

Describe activity

Tell participants that in the first four activities we have defined SBM, examined the rationale for and legislation surrounding SBM, and reviewed the models of SBM. This activity will look at barriers that prevent and inhibit successful implementation of SBM.

Review of research findings

Notes—Research findings

Using Notes—*Research Findings* —discuss the ten barriers to education reform by Schaffer, Nesselrodt and Stringfield.

Small group exercise

Transp.—Barriers to school reform

In small groups, participants should brainstorm a list of 20 issues that are, or have the potential to be, barriers to school/education reform and select their top ten. Each group's top ten list should be transferred to chart paper and posted around the room.

Whole group exercise

Following discussion of research findings, the whole groups should compare their list with the list on Transparency—*Barriers to Reform*— and discuss barriers.

Individual exercise

Individual participants should select a barrier from the list on the transparency—*Barriers to School Reform* —and write a strategy or recommendation that would solve the issue. Make sure that all issues are selected or assigned. Groups may work together selecting one issue per group member. (Assumptions may be necessary for some issues.) Suggested strategies should be shared with the whole group.

*A list of recommendations/strategies is provided for the trainer.

Optional/prior reading

The articles below may be assigned as optional or prior reading:

- *Learning from Mistakes—Successfully Implementing SBM* by David S. Honeyman
- *A Brave New World—School Councils and Boards Do Battle* by Charles J. Russo and J. John Harris, III
- *The Dark Side of Shared Decision Making* by James C. Conway and Frank Calzi
- *Ten Commandments for Successful Site-Based Management* by John R. Hoyle
- *Postcard from an Irregular Country* by Cesare Scurati

(See Bibliography for complete information necessary to locate articles.)

Summary

Summarize major points covered during the activity and answer any questions participants may have.

Evaluation

If this session is being presented separate and apart from activities of the total packet, the presenter may have participants complete an evaluation form

Section III: Activity 6
Notes—Research Findings

Introduction

In a research study conducted by Schaffer, Nesselrodt and Stringfield, supported by the U. S. Department of Education, specific barriers to school reform emerged from the data gathered during the longitudinal study of *Special Strategies for Educating Disadvantaged Children* (Stringfield et al.)

The barriers to school reform reported in this study were found to be widespread within both elementary and secondary school with large populations of socioeconomically disadvantaged children. The barriers, whether actual or threatening, can impede and potentially destroy school reform efforts.

Research findings

Transp.—Barriers to Reform

Close examination of the data revealed ten issues that appeared to be hindering the successful, full implementation of each reform effort. The issues involved:

- financing of the programs;
- leadership of the programs;
- commitment to the program;
- perceptions of the general public, of parents, and of students;
- staffing of the program;
- the curriculum;
- political pressures; racial problems;
- insufficient facilities; and
- problems of management and scheduling of students and the necessary communication among staff.

Financial issues

One essential problem regarding finances was that overall limited funding caused schools to take on one new program after another. With each new program came funding for initial implementation as well as the additional incentives of materials and staff. Many schools will take the money at any cost without considering their capacity to complete the implementation and institutionalization of changes.

Leadership issues	Leadership issues plagued many schools in the study. Principals—like their central office colleagues—are often reluctant to give up power and are fearful of losing their authority, autonomy, privileges, and personal influence. In some cases, principals did not commit to, or even understand, the program for which they were providing leadership. As a result, the staff was permitted to move the program away from its original goals and purpose which derailed the full and effective implementation of the program.
Commitment issues	Some schools have difficulty gaining and/or sustaining commitment among the instructional staff. Some teachers viewed proposed innovations as fads [BEP] that had little effect on real teaching. Others were overwhelmed by the number and complexity of changes asked of them.
Public, parent, and student perceptions	The perceptions of the members of the school community can create problems for some reform efforts. This is particularly evident in schools that have initiated reform efforts with consulting or informing parents and community members. Students' perceptions were a threat at one school that had implemented a new computer curriculum whose activities were repetitious. The staff was concerned that this innovation would soon run its course because of dwindling student interest.
Staffing issues	Issues related to staffing are often a complex part of problems faced by schools implementing a new reform program. For schools with large populations of challenged students, the problem was one of recruitment and /or retention of teachers. Other schools undertook complex reforms that required teachers to assume new instructional roles, and found that the teachers did not possess those skills. Some teachers were stretched beyond their ability. It is possible to train teachers to perform in an alternative type of educational environment. However, it required an immense amount of professional development with follow-up coaching, peer tutoring, and mentoring. Many demands are placed on teachers to perform either a coaching or discussion facilitator role which may be beyond their capacity or comfort zone.

Curricular issues	Another group of destabilizing factors revolved around the curriculum. Arguments stem from the degree of change in the curriculum required by the new program. Questions included: • Does the existing curriculum correspond to how students learn to what they should learn? • Is it consistent with the value of preparing students for productive citizenship in a democratic society? • What are the curriculum's scope, sequence, and balance? • Are issues of multicultural education integrated into the curriculum, or do they appear only in special events or celebrations? • Does the curriculum reflect the concerns and values of the community? • Does what students learn have real applications? • Do students have an active, ongoing voice in what they learn?
Racial issues	A powerful definer of perceptions is one's cultural or racial group. The cultures norms and values of the countries from which people immigrated may reveal distinct characteristics of attitude and communication. Racial issues reduce the communication and responsiveness of members of a school staffs, limiting their ability to continue reform efforts already underway at their schools. For example, developers of one strategy were charged by some members of s school's faculty with being white, ivory-tower professors who knew nothing of teaching inner-city African American children. Can teachers whose races were different from those of the school's children work effectively with those children? One site located on a Indian reservation found non-Native American teachers at a disadvantage because they did not understand the children's native culture, nor could they learn about it because of the secrecy of the tribe about its culture.
Facilities issues	Inadequate facilities can often be a barrier to fully implementing a reform program. In some cases teachers and students were forced to share space where other activities were simultaneously occurring.
Management/ communication/ scheduling issues	This category was somewhat of a "catch all." In one situation, communication between "pull-out" and regular teachers and continuous scheduling problems defeated purposes of reforms efforts by reducing the number of interactions teachers could have with one another.

Summary of issues

Many teachers and administrators work hard to implement educational programs to enhance student opportunities to learn. There are potentially overwhelming forces that can either lessen the effectiveness of the reform effort or completely destroy it. It is crucial that schools take these factors into consideration as they choose programs and develop the contexts in which they implement them.

Recommendations/ Strategies to Solve Issues

Finance—Design programs that can be sustained on local funds. Long-term success depends on adequate, stable, and committed financial support. While seed money may be important to the development of programs, the stability of a program depends on the financial commitment to the program.

Leadership—Strengthen leadership at all levels. Superintendents, principals, and teachers lend informed committed leadership to different elements of the program. Without informed and committed leadership, the implementation is limited or doomed to failure.

Commitment—Gain public commitment for the program from administrators and teachers. The faculty must be assured that school reforms do not threaten their jobs. Rather, reforms provide an opportunity for enhanced professionalism.

Public/parent/student perceptions—Inform students, parents, and the community about why program changes are critical to school improvements.

Staffing—Secure the highest quality of teachers needed for the implementation of the reform. Employ or train for specific elements of the reform. Assume that there will be high levels of turnover and thus the need to create necessary professional development for new teachers.

Curriculum—Select programs that meet the needs of students and are congruent with the goals of the school, the district, and the state.

Political issues—Gain commitment from administrators and others responsible prior to the introduction of the program. Retain the commitment by keeping the administration well informed of the success and limitations of the program.

Facilities—Assess the facilities for adequacy, attractiveness, and comfort or students, teachers, parents, and community.

Management/communication/scheduling—Assess the overall performance and stability of the school base before and during the implementation of the program.

Section III: Activity 6
Transparency: Barriers to Reforms

Barriers to Educational Reform Programs

Finance

Leadership

Commitment

Perceptions of the general public

Staffing

Curriculum

Political pressures

Racial Problems

Insufficient facilities

Problems of management and scheduling of students

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

Section IV: Communication

SECTION IV: ACTIVITY 1

TIME	PURPOSE	SETTING	MATERIALS
30 minutes	• To provide effective communication strategies	Whole Group Small Group	Transp.—Communicating Effectively Notes—Communicating Effectively Transp.—T-Chart Overhead Projector Chart Paper Markers

Share and discuss effective communication strategies

Transparency—Communicating Effectively When:

Notes—Communicating Effectively

Provide participants an overview of effective communication strategies when communicating: orally, in written form, body language, and listening skills.

Place Transparency—*Communicating Effectively When*:—on the overhead and use Notes—*Communicating Effectively*—to provide information that described effective communication strategies.

Allow any whole-group discussion that results from the information given on effective communication strategies.

Describe activity

Transparency—T-Chart
Chart paper
Markers
Masking tape

Ask participants to get into groups of four and choose a recorder and reporter.

Have groups brainstorm what effective communication looks like/does not look like. Group recorder records results on chart paper by making a T-Chart. Place Transparency—T-Chart—on overhead as an example of a properly labeled T-Chart.

Have reporters in each group share their T-Charts with the whole group. Note nay commonalities and differences of the shared discussions.

Summarize

In the sane small groups, have each participant share their strongest/weakest communication skill, based on the strategies that have been presented.

Evaluation

If this activity is being presented separately from the activities of the total section, the presenter may have participants complete an evaluation form

COMMUNICATING ORALLY

COMMUNICATING IN WRITTEN FORM

USING BODY LANGUAGE

USING GOOD LISTENING SKILLS

Section IV: Activity 1
NOTES—Communicating Effectively

Communicating Effectively

Communicating means sharing and understanding. The end result of positive communication should be more support for the group. There are various ways to communicate: oral, written, body language, and listening.

An organization's image and the image of its leaders go hand-in-hand. Mastery of communication skills and using those skills effectively can help your program succeed. Determine which approached and methods of communicating are more effective for your target audiences.

Leaders have certain characteristics that go with image building. A leader must make an assessment of his/her personal strengths and weaknesses and of the strengths and weaknesses of the organization. A positive attitude, willingness at accept a challenge, and work with others, are very important traits.

When Communicating Orally

Organize your thoughts.
Express yourself clearly.
Keep your voice and emotions under control.
Know your listeners.
Avoid distracting speech habits.
Listen and be prepared to respond.

When Communicating in Written Form

Organize your thoughts.
Express yourself clearly.
Write legibly and neatly.
Check for misspelled words and other errors.
Follow directions carefully when filling in forms.
Don't be afraid to use the dictionary, other printed resources and most importantly, people resources when you're in doubt or need other support.

When Using Body Language	Use eye contact effectively. Practice facial expressions and then use them effectively. Practice body posture and be ever aware of the messages your body is sending. Use hands effectively.

Good Listening Skills Will:	Stimulate the other person's active involvement. Show interest in the other person. Evoke a positive response. Express trust and respect. Aid the other person in arriving at a conclusion. Enhance the other person's self-esteem.

Section IV: Activity 1
Transparency—T–Chart

LOOKS LIKE	DOESN'T LOOK LIKE

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
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2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION IV: ACTIVITY 2

TIME	PURPOSE	SETTING	MATERIALS
45 minutes	• To define parent involvement • To discuss different types of parent survey forms • To review key players in parent involvement • To share levels and categories of parent involvement • To understand barriers and benefits to parent involvement	Whole Group Small Group	Transp.—What is Parent Involvement? Transp.—People Support What They Help to Create Handout—Parent Survey Transp.—Key Players in Successful Parent Involvement Programs Transp.—Levels of Parent Involvement Transp.—Categories of Parent Involvement Transp.—Barriers to Parental Involvement Handout—Possible Benefits of Parent Involvement Handout—Appointment Clock Overhead Projector Chart Paper Markers

Define parent involvement

Transparencies—What is Parent Involvement? People Support What Help to Create Communicating

Using the Transparency—*What is Parent Involvement?*—share the definition of parent involvement as adopted by the National PTA Board of Directors.

Place Transparency—*People Support What They Help to Create*—on the overhead and discuss the importance of allowing parents input in their involvement.

Review and discuss parent survey form

Handout—Parent Survey Form

Give participants a copy of the parent survey. Lead a discussion using the Handout—*Parent Survey*. Thus survey gives parents input in developing a Parental Involvement Program that will help to identify needs in their children's school.

Review key players in parent involvement

Transp.—Key Players in Successful Parent Involvement Programs

Chart paper
Markers
Masking tape

Using the Transparency—*Key Players in Successful Parent Involvement Programs*—emphasize the importance of a team effort. From the transparency, identify all stakeholders that help to develop an effective parent involvement program.

Ask participants to get into groups of four and choose a recorder and reporter. Have participants brainstorm and discuss successful and unsuccessful parent involvement programs/activities that their school has been involved in. Ask recorder to record the findings on chart paper. Have reporter to share with the whole group. Discuss findings of the whole group.

Levels and categories of parent involvement

Transparencies—
Levels of Parent Involvement
Categories of Parent Involvement

Place the Transparency—*Levels of Parent Involvement*—on the overhead and discuss the three levels as described on the transparency. Ask participants to share examples of parents and their involvement at each of these levels with the whole group.

Place Transparency—*Categories of Parent Involvement*—on the overhead and use the information on the transparency to discuss each category and the roles of their involvement. Ask participants to share other categories and roles of parent involvement.

Barriers and benefits to parent involvement

Transp.—Barriers to Parental Involvement
Handout—Possible Benefits of Parent Involvement

Use the Transparency—*Barriers to Parental Involvement*—so that participants understand possible barriers of parent involvement that include both professional and parent barriers. Encourage participants to share additional barriers that their school has experience.

Ask participants to share their experiences of the benefits of parent involvement in their school. After the participants have had an opportunity to share, present other possible benefits of parent involvement using Notes—*Possible Benefits of Parent Involvement.*

Summarize

Distribute the Handout—*Appointment Clock*—and ask participants to find a partner to meet with them at each of the "appointed" hours. Allow about 3-5 minutes for each appointment.

After participants have completed making their "appointments," ask them to go to "meet" with their 12:00 appointment and share with each other the different types of parent survey forms and their uses discussed during activity 2.

Next, tell participants to "meet" with their 3:00 appointment and review the key players in parent involvement.

Finally, tell participants to go their 9:00 appointment and share with each other as many barriers and benefits to parent involvement that they can remember.

Evaluation

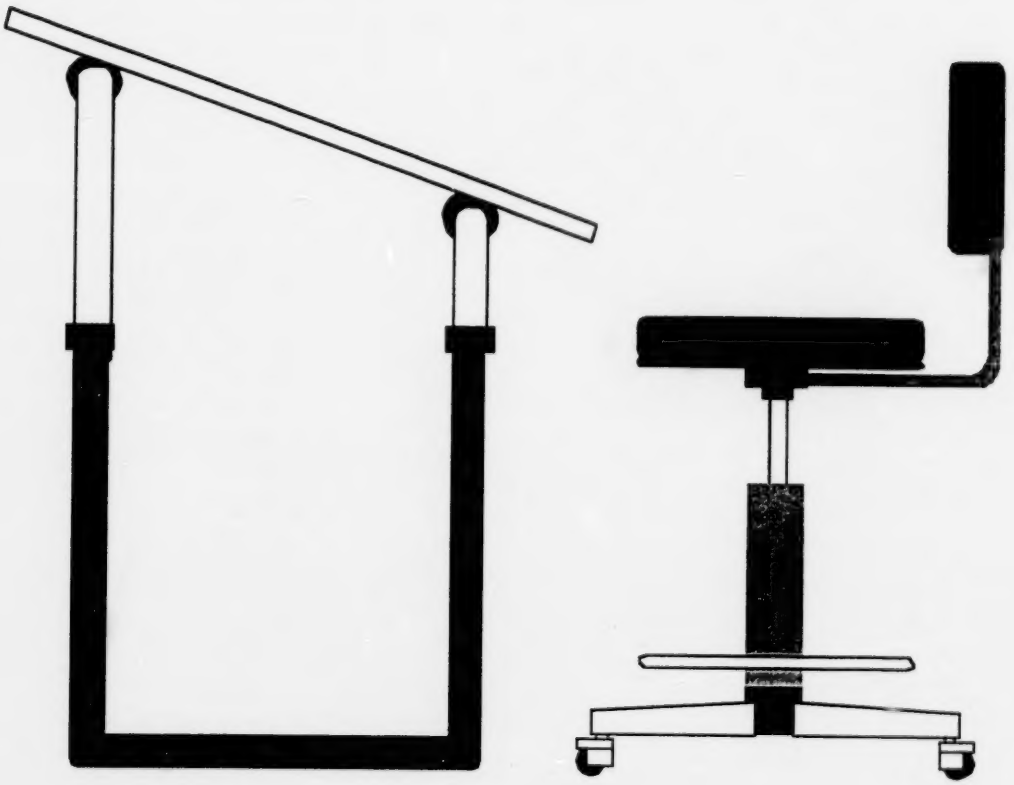
If this activity is being presented separately from the activities of the total section, the presenter may have participants complete an evaluation form

Section IV: Activity 2
Transparency—What is Parent Involvement?

Parent involvement is the participation of parents in every facet of the education and development of children from birth to adulthood, recognizing that parents are the primary influence in children's lives. Parent involvement takes many forms, including the parents' shared responsibilities in decisions about children's education, health and well-being, as well as the parents' participation in organizations that reflect the community's collaborative aspirations for all children.

Adopted by the National PTA Board of Directors

People support . . .



what they help to CREATE

Section IV: Activity 2
Handout — Parent Survey

Dear Parent:

_____ School is in the process of developing a Parental Involvement Program. Parents play an important role in the intellectual, social, and emotional growth of their children, especially during the early years. This program will be designed to help children become more successful in school by working with their parents during these more important years. The program emphasis will be to provide training, guidance, and counseling for parents in the area of child growth and development. In order to determine needs of the children in our school, we would appreciate your answering the following questions.

_____

Superintendent or Principal

---

1. What specifically would you like to know about the school? _____

   _____

   _____

2. From what source(s) do you get most of your information about the school?

   - ❑ Newspaper
   - ❑ Children
   - ❑ Teachers, Principal
   - ❑ School Newsletter
   - ❑ Television
   - ❑ Friends
   - ❑ Other _____

   _____

3. Would you be interested in learning about

   - ❑ the testing program in your school?
   - ❑ improving your child's self-image?
   - ❑ improving your self-image?

4. What specific subjects taught would be of interest to you?

   - ❑ Reading
   - ❑ Math
   - ❑ Art and Music
   - ❑ Other _____

   _____

5. Would you be interested in becoming more involved in school affairs and/or school instruction? ❑ Yes ❑ No

6. Would you be interested in attending a class or session on how parents can help their children at home? ❑ Yes ❑ No

7. Have you ever

Yes	No		
❑	❑	a.	Met the principal of your child's school?
❑	❑	b.	Met the teacher(s) of your child's school?
❑	❑	c.	Visited a class (in session) at your child's school?
❑	❑	d.	Attended any school function?
❑	❑	e.	Had lunch with you child at school?
❑	❑	f.	Visited the school for any other reasons?

8. Would you be interested in participating in a small group, coffee-discussion hour at the school? ❑ Yes ❑ No

Best Time: ❑ Morning ❑ Afternoon ❑ Evening

9. Check the questions below that would help you help your child. Those checked should be ones in which you would be able to participate.

❑ parent/teacher conference
❑ group meetings with a speaker
❑ educational films
❑ meetings to just talk with other parents
❑ sessions about homework, reading, math, etc.

10. I feel that I can talk openly with my child's teacher.

❑ YES ❑ No ❑ To Some Degree

I am well informed about what my child is doing at school

❑ Yes ❑ No ❑ To Some Degree

I feel that the teacher needs to be aware of home problems that may affect my child's work.

❑ Agree ❑ Disagree

11. How effective are the following toward improved communication with your child's teacher and the school?

Open House	❑ Good	❑ Fair	❑ Poor
Evening Grade-Level Orientation Session	❑ Good	❑ Fair	❑ Poor
Teacher-Parent Conferences	❑ Good	❑ Fair	❑ Poor

12. As a parent, do you have trouble with (Check those that apply):

- ❑ your child's homework
- ❑ discipline
- ❑ spending enough time with your child
- ❑ dealing with his/her problems
- ❑ motivating your child

13. As a single parent

Is discipline a problem? ❑ Often ❑ Seldom ❑ Never

Is it a problem to transport your child to school-related events?

❑ Often ❑ Seldom ❑ Never

Is it difficult to spend time with your child?

❑ Often ❑ Seldom ❑ Never

14. During an average week, do you spend time with your child in the following activities?

Yes	No	
❑	❑	a. Playing together with them
❑	❑	b. Reading to them
❑	❑	c. Just talking (Do not include telling them what to do)
❑	❑	d. Watching TV together
❑	❑	e. Helping them with homework

15. Please indicate how interested you are in knowing more about any of these areas: *(If you are interested, circle 1. If somewhat interested, circle 2. If very interested, circle 3.)*

a.	Things to do with my child at home that are fun and educational	1	2	3
b.	Whether my child is developing the way he/she should	1	2	3
c.	How to help my child do better in school	1	2	3
d.	Services provided by the community	1	2	3

Thank you for taking the time to answer these important questions. You child should return the survey to his/her homeroom teacher by _____.

(Community Education Section, 1985)

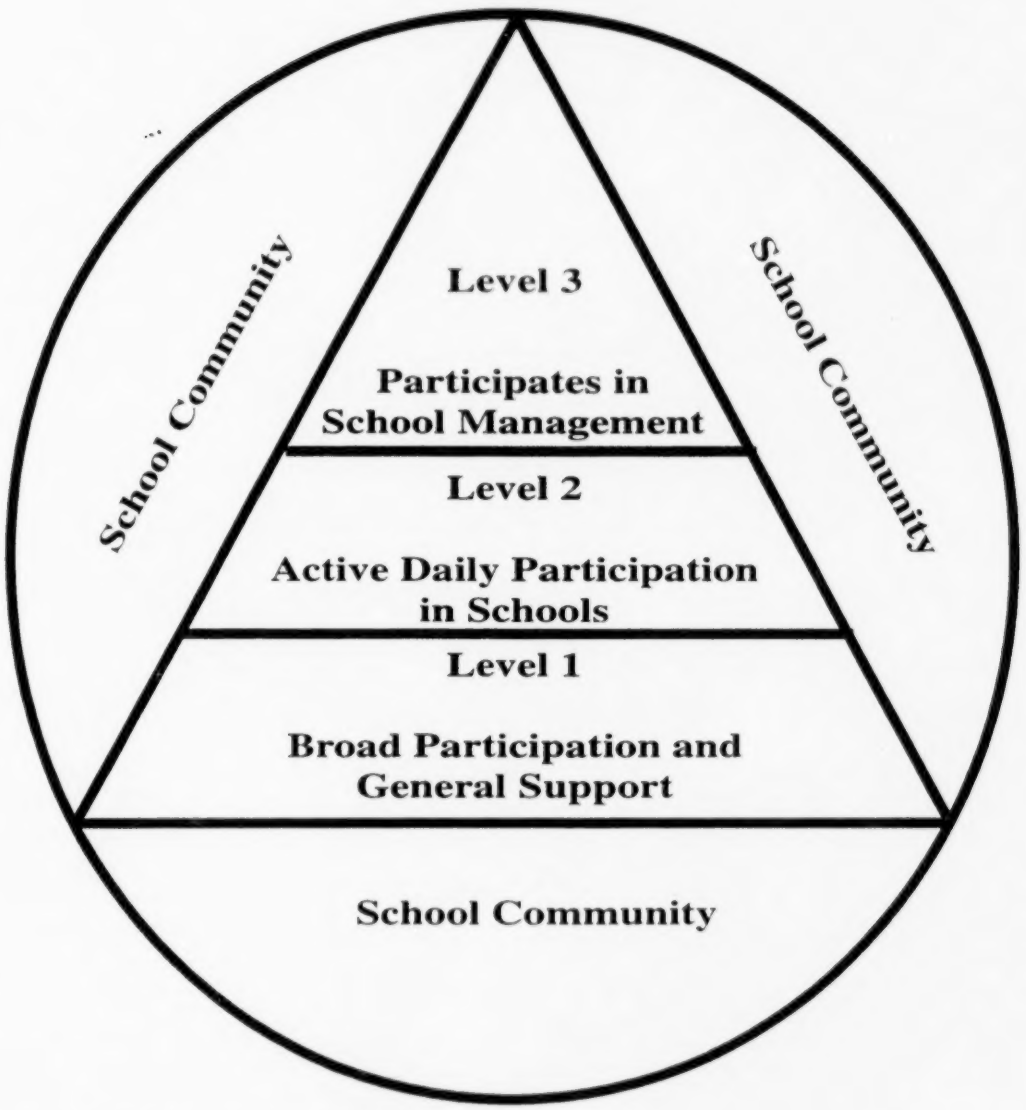
Section IV: Activity 2
Transparency—Key Players in Successful Parent Involvement Programs

Parent involvement is truly a team effort. To be effective, all of the following players must believe in the potential of parent involvement efforts and participate to the fullest in them:

- **Strong school administrative leaders** who understand, encourage and fully support parent involvement
- **Teachers** who are committed to working closely with parents in a variety of capacities
- **Parents** and family members who understand their potential influence and are ready to contribute actively to their children's education
- **Community members** (including businesses and community organizations) who are willing to support the role of parents and families in education

From: SCHOOLS AND COMMUNITIES TOGETHER: A Guide to Parent Involvement, Karen Wikelund, Northwest Regional Education Laboratory, September, 1990, pp. 10, 15-25.

Levels of Parent Involvement



Source: Comer Project for Change in Education, 1991.

Section IV: Activity 2
Transparency—Categories of Parent Involvement

PARENTS AS TEACHERS
- monitor homework
- listen and read to child
- provide learning activities

PARENTS AS LEARNERS
- home-school communication
- parent resource centers
- meetings/workshops
- programs for adult learners

PARENTS AS DECISION-MAKERS
- informed consent for participation
- give opinions on surveys
- participate in parent/school groups
- participate in an advisory group (local/state)

PARENTS AS SUPPORTERS/ADVOCATES
- attends school functions
- school volunteer
- organize school activities
- advocate at local, state, federal levels

North Carolina Dept. of Public Instruction

Professional Barriers

- Resistance by professional staff
- Unwillingness to make necessary investments to time and skills
- Lack of support by school staff to work with interested parents
- Lack of sensitivity to cultural diversity

Parent Barriers

- Attention focused on basic survival needs
- Previous negative experiences in schools
- Psychological: fear, anxiety, intimidation, etc.

Section IV: Activity 2
Handout—Possible Benefits of Parent Involvement

1. Teachers can more accurately assess children when they have more information about their home environment.
2. Involved parents can learn to appreciate their child's strengths and weaknesses.
3. Parents, as taxpayers, are our employers and have a right to a voice in their child(ren)'s education.
4. Parent involvement can maximize consumer satisfaction in our educational system.
5. Parents are daily teaching their children and it benefits everyone when we support them in this endeavor.
6. Parent involvement can serve as a way in which to increase use of teacher time.
7. Involved parents can provide a support system for one another.
8. Involving parents will make them feel as partners in education working toward a common goal.
9. Helping students solve or cope with family problems can significantly reduce tensions and problems in school.
10. Helping parents improve parenting skills can benefit school and society by sending to school more responsible and school-ready children.
11. Parents have valuable life experiences that can be valuable resources for the total school community.
12. A child's acceptance of school rests heavily on parental attitudes and interactions with school personnel.
13. Parent involvement in almost any form improves student achievement. Parents are a tremendous, yet largely untapped, resource for public education.

Source: Audrie Daniel-Murphy, Chapter 1 Parent Coordinator, New Hanover County Schools, Wilmington, NC.

Section IV: Activity 3

Handout — Effective Media Relations

APPOINTMENT CLOCK

DIRECTIONS: With your appointment clock, find a partner to meet with you at the "appointed" hours.

12:00

9:00

3:00

6:00

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

•

SECTION IV: ACTIVITY 3

TIME	PURPOSE	SETTING	MATERIALS
45 minutes	• To provide information on communicating with the media • To discuss how to handle a crisis • To discuss what motivates volunteers • To review ways in which volunteers can help at the school level • To discuss changing the way we communicate with teachers and other agencies	Whole Group Small Group Individual	Transp.—Effective Media Relations Handout—Effective Media Relations and Crisis Management Transp.—Handling a Crisis Handout—Handling a Crisis or Adverse Publicity Handout—What Motivates Volunteers Handout—Seven Ways to Motivate People Handout—Ways Volunteers Can Help at the School Level Transp.—Guidelines Consensus Overhead Projector Chart Paper Markers

Provide information on effective media relations

Transp.—Effective Media Relations
Handout—Effective Media Relations and Crisis Management

Place Transparency—*Effective Media Relations*—on the overhead. Use Handout—*Effective Media Relations* and Handout—*Crisis Management*—to provide information relating to dealing with the media. Ask participants to share with the whole group any positive or negative media experiences that they have encountered.

Discuss how to handle a crisis

Transp.—Handling a Crisis
Handout—Handling a Crisis or Adverse Publicity

With the Transparency—*Handling a Crisis*—discuss the three C's that may be useful when dealing with a crisis. Use the Handout—*Handling a Crisis or Adverse Publicity*—to support the information on the transparency.

Describe activity

Handout—What Motivates Volunteers

Handout—Seven Ways to Motivate People

Give participants the Handout—What Motivates Volunteers? Read the directions on the handout and ask each participant to rate three factors. After each participant rates the factors, ask a volunteer to tally the results on chart paper. Discuss the results.
After completing the activity, share with the participants the Handout—Seven Ways to Motivate People—by Paul J. Meyer. Ask participants if they agree/disagree with Meyer's comments.

How to Use Community and Parent Volunteers

Handout—Ways Volunteers Can Help at the School Level

Transp.—Consensus Guidelines

Chart paper
Markers
Masking tape

Ask participants to get into groups of four. Choose a reporter and recorder. Give each group a Handout—Ways Volunteers Can Help at the School Level. (Use the appropriate school level handout--elementary or secondary.) Have groups come to consensus on the three most helpful and the three least helpful ways that volunteers can be used at the school level. Before the groups begin, use the Transparency—Consensus Guidelines—to review the key points about reaching consensus.

After coming to consensus, ask the recorder to record the group's conclusions. Share the results with the whole group.

Ask participants how they can use these results to foster positive ways for using the community and parent volunteers at the school level. Encourage individual responses.

Summarize

Briefly summarize effective communication strategies and stakeholders that we must communicate with in order to build educational partnerships with schools.

Evaluation

If this activity is being presented separately from the activities of the total section, the presenter may have participants complete an evaluation form

EFFECTIVE MEDIA RELATIONS

Preparing for Interview

•
•
•

During Interview

•
•
•

Television Interview

ON-GOING MEDIA RELATIONSHIP

Section IV: Activity 3
Handout—Effective Media Relations and Crisis Management

How to Prepare for an Interview

When receiving a request for an interview, the first question should be "Why me?" In many cases, you aren't the expert or the authority that should be interviewed, and someone else would be more appropriate. Make sure you are the one who can do the job.

1. **Take all request seriously, regardless of the size of the media outlet.** What you say in Podunk today can be national headlines tomorrow.
2. **Ask the general nature of the interview** as well as any specific topics that might be discussed.
3. **Then do your homework.** Be prepared. Research the facts and figures of your agency. Check with your associates for their thoughts on questions that might arise.
4. **Compile a list of questions** you may be asked and make sure you know the answers. Rehearse!
5. **Make a list of three key points** that you want to make . . . and be sure you make them!
6. **Expect the tough question**—the one you really don't want to be asked—to be asked.
7. **Seek professional help** from a communications specialist if needed.

During an Interview

1. **Always be honest.** Never tell a lie.
2. **Don't try to talk off the record.**
3. **Use language the reporter and the public will understand.** Avoid "trade talk."
4. **Answer the question first**—yes or no if possible—then give the background. Not vice versa.
5. **Be as brief as possible.** Long, rambling answers are confusing. If you want to be understood, give short, direct answers.
6. **Don't answer questions that were not asked.**
7. **Never lose your cool,** no matter how exasperated you feel. Maintain your class and dignity.
8. **Never say "no comment."** Give your reason for not answering the question.
9. **Don't try to answer personal questions**.
10. **Don't try to be funny** or give cute answers.
11. **Try to turn negative questions into positive answers** (bridging).
12. **Avoid answering "what if" questions,** since this type of answer is merely speculation.
13. **Be sure to make the three points** you wanted to make.

For Television Interview

1. **Find out if the interview will be live or on tape.** You can say whatever you please on a live interview but taped interviews may be edited.
2. **Dress properly and conservatively, like a business executive.** Avoid plaid, checks, and "flashy" clothing.
3. If it is suggested, **let them apply a little pancake makeup** to your forehead to avoid a shiny, light-reflecting forehead.
4. **Never look at the camera.** Look at the person who us asking the questions.
5. **Don't get to chummy** with the interviewer by calling him/her by the first name too often.
6. **Don't sit in a swivel chair** (you will move from side to side if you are nervous) or behind a desk (it makes you look pompous).
7. **Watch your posture!** Sit tall with your legs crossed gracefully and your hands folded in your lap.
8. **Remember that the interview may not be over just because the lights and the cameras are turned off**. What you say after the interview may be used later on.
9. **Remember that you are on TV for a reason:** to sway the public opinion. Don't ever lose sight of that.

For an Effective, On-Going Media Relationship

1. **Always know who covers your "beat"** or your industry and try to meet them before having to work with them.
2. **Always be honest.** There is never a need to lie.
3. **Be prepared.** Anticipate media questions and rehearse your answers. Knowing the facts and figures about the school is essential.
4. **Don't look for fights with the press.** This is a way you cannot win.
5. **Don't ever try to have a story killed**.
6. **Don't play favorites with the media.** Every media outlet in your area is a competitor.
7. **Be accessible.** Return all telephone calls and answer all media inquiries.
8. **Learn to say "thanks"** and be as quick to praise as you are to condemn.
9. **Never threaten a reporter and never try to reward one**.
10. **Have one person in your group answer all "policy" questions.**
11. **Be as fast to report negative news as you are to report positive news.** It will blow their minds.
12. **When a controversy arises, state your side of the story accurately, candidly and honestly;** then let the matter drop as quickly as possible. Don't prolong a controversy.
13. **If you receive a telephone inquiry from a reporter, don't answer immediately.** Tell him you will call him/her back in a few minutes. Then think out the question and arrive at an intelligent answer, not one that is too spontaneous.
14. **Don't ever tell a reporter you need publicity for a project/subject.** Reporters are not you press agent.
15. **Don't expect reporters to make you look good.** If you say dumb things then that's what will be reported.

HANDLING A CRISIS
Remember the three C's

Candid — Explain what happened to the best of your knowledge. If you don't know, find out. Do this quickly, accurately, and honestly.

Contrite — If you or your group was to blame, apologize and express your regret, saying that every effort will be made see that this does not happen again.

Compassionate — Be sorry for any loss of lives, injuries or inconveniences . . . and mean it when you say it.

Section IV: Activity 3
Handout—Handling a Crisis or Adverse Publicity

Remember the three C's:

- Be candid
- Be contrite
- Be compassionate

Candid	Explain what happened to the best of your knowledge. If you don't know, find out. Do this quickly, accurately and honestly.
Contrite	If you or your group was to blame, apologize and express your regret, saying that every effort will be made to see that this doesn't happen again.
Compassionate	Be sorry for any loss of lives, injuries or inconveniences . . . and mean it when you say it.

Remember that the public expects and appreciates an apology. And the public is quick to forgive those who say genuinely, "I'm sorry."

1. Don't let costs interfere with doing what's right.
2. Have a Crisis Management Plan that everyone in the group knows and understands. Rehearse this plan frequently!
3. Don't prolong a crisis. Get it over with—and out of the news—as quickly as possible.

Section IV: Activity 3
Handout—What Motivates Volunteers?

Please rate the following factors from 1 to 10. The number 1 denotes the most important to you as a volunteer, and the number 10 denotes the least important to you.

_____ Opportunity to Develop Special Abilities

_____ Acceptance from Members of Organizations

_____ Enough Information to Get the Job Done

_____ Recognition for Your Time and Efforts

_____ Seeing the Results of Your Work

_____ Interesting Work

_____ Promotion and Growth in the Organization

_____ Enough Authority to Get the Job Done

_____ Good Working Conditions

_____ Enough Help and Equipment to Get the Job Done

Section IV: Activity 3
Handout—Seven Ways to Motivate People

- Flatter them by showing your personal interest. There is nothing wrong with flattery when it is sincere.

- Be consistent and impartial in your treatment of people. This is not as easy as it sounds; it takes practice and constant self-examination.

- Build up their confidence and pride by consulting with them regularly. Seek out their opinions and advice. Make people feel as though they are participating, not just taking orders.

- Be generous with credit. Be as quick to praise as you are to criticize. Remember, when your co-workers perform well, it's a credit to you.

- Treat ideas with interest, consideration, and respect. When someone brings you an idea, even a poor one, make him feel glad he brought it to you. His next idea may be a good one.

- Admit your own errors honestly. Show people that you are just as human as they are.

- Make facts flow freely. Know-how is man's link to opportunity and advancement. Sharing your knowledge and your experience will convince people that you are on their side, and it's only human to reciprocate.

Section IV: Activity 3
Handout—Ways Volunteers Can Help

Thirty Ways Volunteers Can Help at the Secondary School Level

Use these ideas for starters.

1. Volunteers whoa re native speakers from other countries and people who speak foreign languages fluently can give language students extra practice in conversation or discuss the literature that advanced language students are reading.

2. Volunteers can be available in guidance offices to help students find answers to questions about careers, training opportunities and college selections.

3. Volunteers can contribute to social studies units. Resource people from the community can speak or be interviewed on topics in which they have experience and expertise. A senior citizen can supply details on local history. Other may describe their personal participation in events such as bombings in London during World War II, the Nazi holocaust, the Vietnam War, the civil rights movement, political campaigns or other current events. A city planner might discuss urban renewal or current zoning problems.

4. Volunteers can help students use library sources and assist with research projects.

5. Volunteers can assist teachers in gathering resources for units of study.

6. Volunteer nurses may extend the work of the school nurse . . . for example, they might help teach cardiopulmonary resuscitation to health classes.

7. Volunteers can tape record textbooks so that students who have reading problems may listen to cassettes as they read their assignments.

8. Volunteers can prepare tactile materials for visually impaired students . . . using large print typewriters, Brailling machine, etc.

9. Volunteers can assist in science and math laboratories.

10. Volunteers can help in vocational classrooms and laboratories such as printing, auto mechanics, commercial food and sewing, industrial arts, construction trades.

11. Volunteers can accompany the school chorus and help build sets for the school play.

12. Volunteers who are artists and performers (such as musicians and dancers) can assist and encourage students who aspire to careers in fine arts.

13. Volunteers can arrange meaningful field trips into the community to augment class learning.

14. Volunteers can share collections, discuss careers, travels, hobbies, and other areas of special knowledge.

15. Volunteers can sponsor school clubs and interest groups.

16. Volunteers can assist with audiovisual equipment maintenance and scheduling, and with production of video cassettes and other AV products.

17. Volunteers can assist the staffs of student publications . . . yearbook, literary magazine, newspaper.

18. Volunteers can produce a parent-teacher newsletter to inform parents of student and school achievements and activities.

19. Volunteers can assist teachers in academic subject matter areas.

20. Volunteers can assist special education teachers, giving students extra drill and reinforcement concepts.

21. Volunteers can assist English teachers as lay readers of student essays and compositions, enabling teachers to give more writing assignments.

22. Volunteers can help students who were absent to make up missed work.

23. Volunteers can supervise students who are taking tests.

24. Volunteers can assist non-English speaking students in expanding their vocabularies and improving conversational skills.

25. Volunteers can share slides and artifacts from other cultures and countries as well as from different sections of the United States.

26. Volunteers might share their own experiences such as what it's like to be a handicapped person and how the handicap impacts relationships and career choices.

27. Volunteers can demonstrate a variety of artistic abilities.

28. Volunteers from various ethnic backgrounds might share their individual life experiences.

29. Volunteers can assist in organizing a college fair.

30. Volunteers can assist in organizing a career exploration day or week.

- **Avoid arguing in an attempt to win as an individual.**
- **Avoid changing your mind only to reach agreement and avoid conflict.**
- **Support only decisions with which you are able to agree.**
- **Avoid majority voting, averaging, or trading.**
- **View differences of opinion as helpful to good decision-making.**
- **Consider more alternatives if objections exist and consensus has not been reached.**
- **Agree on easier items, then deal with harder ones.**

EVALUATION FORM

EVALUATION FORM

Title of Presentation: _____

Presenter(s): _____

Date: _____

Location: _____

Participant's Position: _____

School: _____

Part I

1. What was the most useful part of this session?

•

2. What did you learn from this session?

•

3. How will this help you in your position?

•

Part II

Please indicate your opinion of this session by checking the appropriate column according to the scale below:

SA=Strongly Agree **A**=Agree **D**=Disagree **SD**=Strongly Disagree

Statement	SA	A	D	SD
1. The purpose/objectives of the session were clear.				
2. The presentation increased my knowledge of the content.				
3. The presentation was organized effectively.				
4. Activities were appropriate to my needs.				
5. The presenter(s) encouraged and allowed time for questions.				
6. As an overall evaluation of this session, I consider it worthwhile.				

Part III Additional Comments/Suggestions

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